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ABSTRACT

A school board meeting serves several purposes. It is important that school boards be successful and effective governing bodies. This means becoming more efficient in conducting routine business; improving their ability to reach constructive decisions and to solve problems; making their meetings a source of good will among members, students, and community; and developing written policy and procedures for conducting board meetings and following them. This handbook is intended to help school boards become more effective governing bodies and introduces the school board member to the laws regulating the conduct of school board meetings in the state of Illinois. The book is divided into 10 sections: (1) organizing the school board; (2) some legal requirements in Illinois; (3) planning the meeting; (4) conducting the meeting; (5) duties and responsibilities; (6) recording the meeting; (7) making and monitoring school board decisions; (8) dealing with the public; (9) dealing with the news media; and (10) evaluating the school board meeting. A table of exhibits, a table of sample policies, and 10 related articles are appended. (SI)

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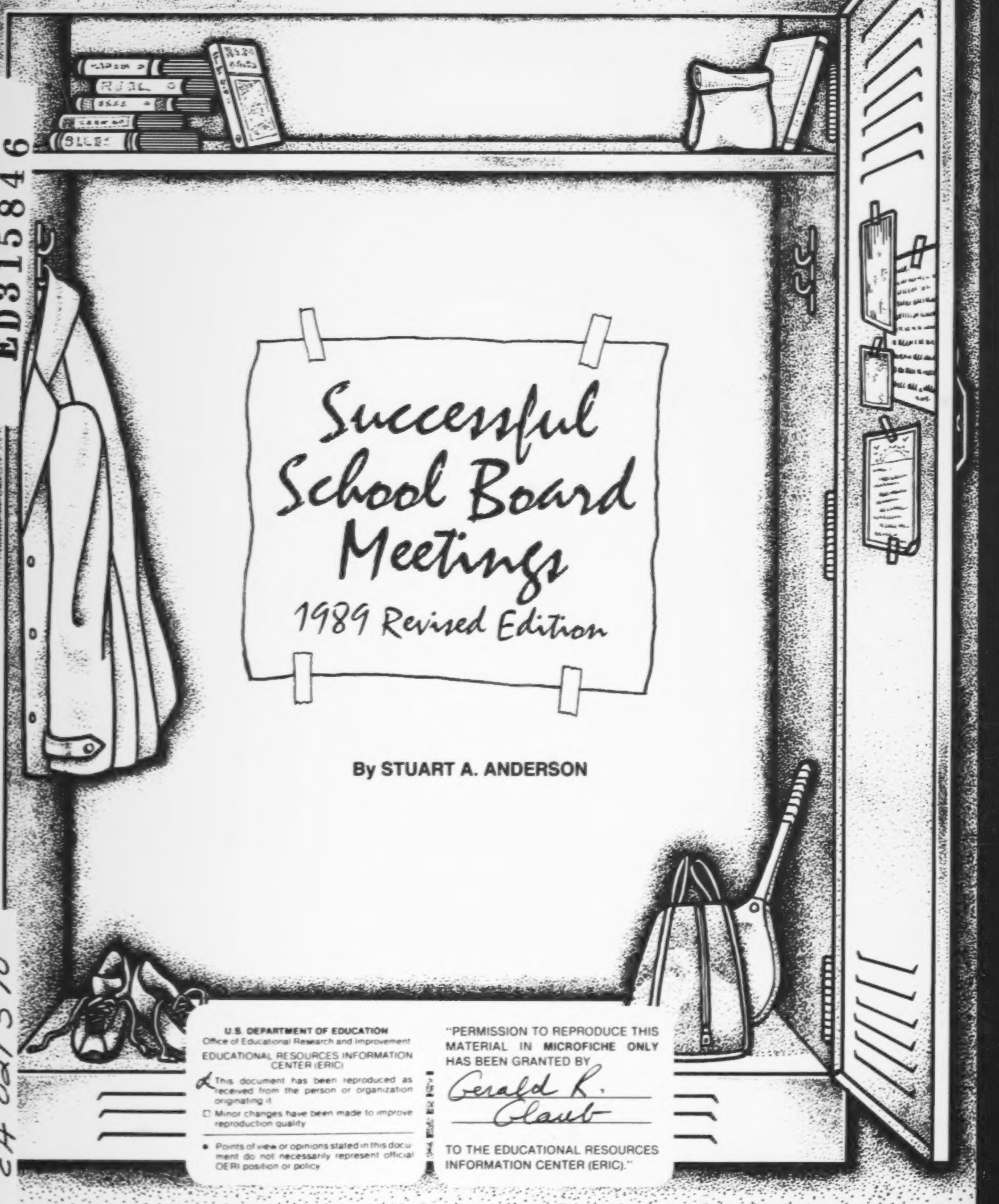

Successful School Board Meetings

1989 Revised Edition

By STUART A. ANDERSON

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Successful School Board Meetings

1989 Revised Edition

By STUART A. ANDERSON
in collaboration with the staff of the
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1982 Edition

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FOREWORD

A school board meeting serves several purposes. The official meeting is the only means by which the board can carry out its legal duties or exercise its legal powers. Therefore, the primary purpose of a school board meeting is to transact business.

The board meeting also provides opportunities for creative and constructive decision making and for healthy communications between the school board and its constitutents. Before the board can turn to matters of policy development, creative problem solving, and communications, however, routine business must be efficiently completed.

Unfortunately, many school boards have not learned the secret of successful meetings—which usually is nothing more than careful planning as to procedures and subject matter, plus good human relations. As a result, some boards find their meetings drag on interminably, never getting beyond the routine and more notable for their boredom than anything else. Still others find their meetings disrupted by public outbursts that impede the conduct of business, hold the board up to ridicule, and leave many people angry.

This handbook is intended to help school boards become more effective governing bodies by:

1) Becoming more efficient in conducting routine business;

2) Improving their ability to reach constructive decisions and to solve problems;

3) Making their meetings a source of good will among members, students, and community; and

4) Developing written policies and procedures for conducting board meetings and following them.

To repeat: the secret is effective planning. There is no magic formula. The board must reach a consensus on what its meetings are supposed to accomplish and how this will be done. Then the members must reduce this consensus to writing—and abide by it.

A school board meeting is like a mirror. It reflects the collective personalities of the participants. The reflection can be distorted by a failure to plan or by inattention to such details as the seating arrangement. The board's image, as reflected in the meeting, also can be distorted by obsolete practices that may have been established by persons no longer serving on the board.

Every school board must be self-aware. No board should accept as gospel the procedures it follows today, for they may have been designed by an earlier board and repeated year after year without real thought. Board meetings that do not change to meet changing conditions tend to become stodgy and stilted. They lose meaning even to the participants.

Successful meetings, on the other hand, enable the school board to conduct its business with dispatch and provide the decisive leadership which schools so desperately need today.

Harold P. Seamon
Executive Director
Illinois Association of School Boards

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INTRODUCTION

New school board members come to their first board meetings filled with anticipation and inspiration. A few go home with disappointment.

> I told the board president I wanted our elementary reading program evaluated this month, but nothing's being done.

This new board member's problem is a common misconception about the legal nature of school boards. But it probably won't take long to learn that a school board speaks with one voice—not seven. The majority rules, not the individual member.

It is this statutory insistence on group decisions that gives the school board meeting its meaning. The law extends very limited rights to the individual board member. Other than the right to take part in board deliberations and to vote on each motion before the board, the individual member appears to have no special rights beyond those accorded any other citizen.

Although the rights of the individual member are few, they can be potent when the individual understands the bigger picture. The state delegates its real powers to the board as a group. The board member who understands this has the incentive and the impetus to become an effective participant in the decision-making process.

Making group decisions is what bonds the seven individuals who find themselves thrown together on the school board. They study, discuss and vote on each decision, and then take responsibility for the consequences.

> I'm not too crazy about the decision we finally made; but let's face it, we're all responsible for making it work.

Without the need for group decisions, school board meetings would be unnecessary and impossible. Members must cooperate or the board can't carry out its statutory duties. A successful school board meeting is a tribute to the willingness of members to subordinate their self-interests to the needs of the group. Board members soon learn that their individual rights mean little unless the entire board succeeds.

It is this realization that converts the chaos of divergent individual goals into successful school board meetings. Some observers see the successful school board meeting as a tribute to individuals serving on the board. Others see it as proof that representative democracy does work.

The law does not—and cannot—regulate the relationship among members of the school board or the behavior of individual members. It is cooperation that produces efficiency in carrying out board duties and wisdom in exercising board powers.

The importance of the law must not be underestimated, however. Illinois statutes regulate many aspects of school board meetings. These legal requirements are found in two principal areas of the *Illinois Revised Statutes:*

1) Chapter 122, *The School Code of Illinois*, governs the organization of the school board (Article 10), the appointment of a treasurer (Article 8), and the conduct of elections (Article 9).

2) Chapter 102, Sections 41 to 46, *The Open Meetings Act*, requires that public business be deliberated openly and governs such matters as time, place, public notice, and the keeping of minutes.

Taken together, these laws go a long way in determining how an Illinois school board functions. However, these laws leave wide areas of discretion where school boards succeed or fail by their own action or inaction. Wise boards fill in those wide areas of discretion with their own policies that set forth rules of procedure for conducting business.

One statutory duty of school boards, for example, is "to adopt and enforce all necessary rules . . ." But there is no law requiring a school board to abide by *Robert's Rules of Order* or any other particular rules. There is no law that says the president of the board cannot make a motion or that requires motions to be seconded. There is no law that says a school board cannot set a time limit for its meetings and no law that requires it.

These are among the many procedural considerations that members of each school board must agree on and set down in writing for their own guidance and for the guidance of others who look to the board for leadership.

If all seven members of a school board were starting from scratch to develop succesful meetings, they would be well-advised to look first to the law for directions. They would then examine their own preferences for rules of procedure, probably with frequent reference to *Robert's Rules of Order*. Then they would combine their rules with the law in a set of written policies. Finally, they would apply those policies to practice and see how they work.

Few school boards start from scratch. The typical school board meeting is the product of tradition. Rules for conducting meetings are handed down from one board to the next. Tradition is good to the extent that it reflects the needs of each community. Tradition is bad to the extent that it ignores changes in the law, as well as opportunities to do things a little better.

This book introduces the school board member to the laws regulating the conduct of school board meetings. It also offers suggestions and alternatives for improved procedures that contribute to efficiency in carrying out board duties and wisdom in exercising board powers.

However, this book does not specifically deal with the Illinois *Open Meetings Act*, except when the Act touches upon the conduct of board business. The *Open Meetings Act* is a subject in itself that is beyond the scope of this book. It is treated in other publications available from the Illinois Association of School Boards and other sources.

School boards are urged to work closely with their attorneys in keeping their policies current with the *Open Meetings Act* and the frequent interpretations it receives from the courts and the Illinois Attorney General.

1. ORGANIZING THE SCHOOL BOARD

Following each election of new members, Illinois school boards must meet, canvass precinct returns, declare the winners, and then adjourn for the final time (*sine die*). In effect, the existing school board disbands following the election and a new school board comes into being—even if no new members are being seated.

Canvassing the election results

School boards are directed by Article 9 of *The School Code* to canvass the results of board member elections within seven days after the election.* Should a regular meting fall within the seven-day period, the board may canvass the election on that date. If not, the board should adjourn its last regular meeting prior to the election to a date within the seven-day period, or a special meeting must be called within that period.

At the meeting, the board canvasses the returns and declares the results of the election. It is generally recommended that no other business be transacted by the outgoing board at this meeting. However, the outgoing board could approve the minutes of its meetings which have not yet come up for approval. This action merely is an approval of the record of business already conducted.

In some districts, the outgoing board completes as much "old business" as possible at this meeting in order to start the new board with a relatively clean slate. Other boards prefer to conclude outstanding busines at a meeting prior to the election. Appearances would seem to favor the latter practice.

The canvass furnishes an official means of combining election returns from various county election offices and serves as a means of checking to some degree the work of the election officials.

The new school board

Section 10-16 of *The School Code* begins as follows:

> Within seven days after the election the school board shall organize by electing its officers and fixing a time and place for the regular meetings.

The meeting to canvass the board member election and the organization meeting of the new board normally are held together. The retiring president usually acts as temporary chairman for the new board, unless someone else is selected, which the board may do at its discretion. The retiring secretary is usually called upon to act as temporary secretary. These two officers retain their powers until their respective successors are elected.

The retiring board is generally understood to continue in existence until the new board is organized, and that occurs as soon as the new board elects its own president and secretary, temporary or permanent, and thus becomes a body duly constituted to transact business in place of the board which has ceased to exist.

Oath of office

While not required by law, some school boards make it a custom to administer an oath of office to new members. Others devise their own special ceremonies to mark the official seating of new members.

An appropriate oath of office would be something similar to the following:

> I do solemnly swear (or affirm, as the case may be) that I will support the constitution of the United States, and the constitution of the State of Illinois, and that I will faithfully discharge the duties of the office of Member of the Board of Education (or School Directors, as the case may be) of School District Number _____ of ____________ ____________ County, Illinois, according to the best of my ability.

**Exception: For some school boards, the canvass is made by a board of election commissioners.*

The Code of Conduct for Members of School Boards adopted by the Illinois Association of School Boards also is used by some boards as a form of oath or affirmation. **See Exhibit A.** *The Code of Conduct* reminds all board members of the performance standards that have become conventional wisdom over the years.

Election of officers

The president of the board is the first officer to be elected. The term is fixed at two years unless the board, by policy, establishes a one-year term for officers. The president must be a member of the board. **See Sample Policy One** on page 14.

Nominations need not be seconded. If only one member is nominated, the secretary *pro tem* is instructed to cast a unanimous ballot for that member, who is thereupon declared elected. The president *pro tem* then relinquishes the chair to the newly-elected president. If two or more members are nominated, the election for president and secretary should be by an open vote and not by any form of secret ballot. There is no provision in the law for a secret vote, and the declared public policy of the state as expressed in the *Open Meetings Act* is that actions of public bodies be taken openly.

Immediately following the election of the president, the amount of compensation to be received by the board clerk or secretary should be established, as the law requires that any such compensation be determined prior to the election of the clerk or secretary.

Term of office for the secretary is two years, unless the board officially sets the term at one year. In board of education districts, it is not required that the secretary be a member of the board of education. In board of director districts, the clerk must be a member of the board. **See Sample Policy Two** on page 14.

Both the president and the secretary play key roles in the effective functioning of the school board. Individuals selected for these positions should be fully aware of the responsibilities involved and possess the requisite skills. **See Chapter 5.**

A relatively recent requirement of Illinois law (1987) is the election of a school board vice president, who must be a board member elected in the same manner as the president and secretary. The vice president performs the duties of the president when the presidency is vacant or when the president is absent or unable to perform them.

Secretary's designated representative— Where the secretary or clerk is a member of the school board, it is recommended that an official representative be designated. There are certain tasks requiring the secretary to be "on the scene"—such as accepting nominating papers during the board election filing period.

Moreover, experience strongly suggests it is nearly impossible for a board member to participate effectively in a meeting and record minutes at the same time.

The board should adopt a resolution appointing an employee of the district as the secretary's designated representative.

Absence of officers—If the president is absent from any meeting or is unable or unwilling to perform his duties, the vice president serves as president *pro tem.*

In the absence of both officers, the secretary may call the meeting to order and any other member of the board may be appointed president *pro tem.*

If the clerk or secretary is absent or refuses to perform his duties, a clerk or secretary *pro tem* is appointed. In board of director districts, the clerk *pro tem* must be a board member. In board of education districts, the secretary *pro tem* need not be a board member.

Establishing regular meetings

All school boards are required to hold regular meetings, and public notice of the schedule must be given as prescribed in the *Open Meetings Act.* **See Chapter 2.** The established meeting date remains until changed by official action of the board followed by public notification.

A regular meeting time and place must be established at the organization meeting of the new board following each school board election. *The School Code* requires that "the board shall organize by electing its officers, and fixing a time and place for the regular meetings."

The school treasurer

Some Illinois school districts are required to appoint a treasurer; some are not.

In Cook County, the treasurer is appointed by the township board of school trustees and serves a two-year term. The trustees also designate banks to serve as depositories for school funds. The township treasurer must not be a school board member.

In all Illinois counties other than Cook, the local board of education appoints a treasurer to serve as custodian of school funds. The treasurer must meet a number of qualifications specified in Section 8-1 of *The School Code*, including financial experience or training.

The school treasurer may be:

1) a member of the school board, in which case the treasurer serves a one-year term without com-

Exhibit A—Code of Conduct

Code of Conduct for members of school boards

As a member of my local board of education, I shall do my utmost to represent the public interest in education by adhering to the following commitments:

1. I shall represent all school district constituents honestly and equally and refuse to surrender my responsibilities to special interest or partisan political groups.
2. I shall avoid any conflict of interest or the appearance of impropriety which could result from my position, and shall not use my board membership for personal gain or publicity.
3. I shall recognize that a board member has no legal authority as an individual and that decisions can be made only by a majority vote at a board meeting.
4. I shall take no private action that might compromise the board or administration and shall respect the confidentiality of privileged information.
5. I shall abide by majority decisions of the board, while retaining the right to seek changes in such decisions through ethical and constructive channels.
6. I shall encourage and respect the free expression of opinion by my fellow board members and others who seek a hearing before the board.
7. I shall be involved and knowledgeable about not only local educational concerns, but also about state and national issues.

In addition, I shall encourage my board of education to pursue the following goals:

1. The development of educational programs which meet the individual needs of every student, regardless of ability, race, sex, creed, or social standing.
2. The development of procedures for the regular and systematic evaluation of programs, staff performance, and board operations to ensure progress toward educational and fiscal goals.
3. The development of effective school board policies which provide direction for the operation of the schools and delegate authority to the superintendent for their administration.
4. The development of systematic communications which ensure that the school board, administration, staff, students, and community are fully informed and that the staff understands the community's aspirations for its schools.
5. The development of sound business practices which ensure that every dollar spent produces maximum benefits.

Illinois Association of School Boards

Sample Policy One—
Duties of the President

The President of the Board of Education shall preside at all meetings and shall perform such other duties as usually pertain to the office or as are imposed by law or by action of the Board of Education.

The President shall have the same rights as do other members of the Board to offer resolutions, to make or second motions, to discuss questions, and to vote thereon.

The President shall appoint or provide for the appointment of all committees unless otherwise directed by the Board, and shall be ex-officio member of such committees.

The President shall represent the Board in deliberations with other Boards or agencies unless another member is so designated.

The President shall call special meetings of the Board.

The President shall sign official District documents that require the signature of the President's office.

Duties of the Vice-President

The Vice-President of the School Board shall perform the duties of the President if there is a vacancy in the office of President, if the Prsident is absent or if the President is unable to perform the duties of the office. The Vice President shall perform other duties as imposed by the rules of the Board.

pensation, or

2) not a member of the school board, in which case the treasurer serves "at the pleasure of the board" and with compensation fixed by the board. Compensation must be set prior to the appointment.

The School Code does not specify a time for appointing a school treasurer. However, because most school boards appoint someone other than a member as treasurer (second option above), the treasurer serves until resignation or until the board decides it wants to appoint someone else.

The treasurer who is a member of the board is elected by the members for a term of one year. The treasurer in this instance is typically elected sometime before the end of the fiscal year for a term beginning July 1 and ending June 30. A newly-appointed treasurer must meet bonding requirements and obtain a certificate of bonding approval from the regional superintendent—steps that take a certain amount of time.

In addition, the appointed treasurer who serves at the pleasure of the board probably should have his position reaffirmed by board action each year, preceded by any action the board might wish to take regarding compensation. This action may be taken at any time, but is probably best established at a regular annual time that does not coincide with the annual (or biennial) organizational meeting. Again, sometime before the end of the fiscal year is suggested as an appropriate time.

At the same meeting that the treasurer is appointed or re-appointed, the board should take action designating the official depositories for school funds.

Note on bonding: Whether appointed by a board of township trustees or local school board, the treasurer must execute a bond, payable to the appointing body, that is equal to "at least twice the amount of all bonds, notes, mortgages, moneys, and effects of which he is to have custody, if individuals act as sureties, or in the amount of all bonds, notes, mortgages, moneys, and effects if

Sample Policy Two—
Duties of the Secretary

The Secretary shall perform all duties usually pertaining to the office and such as are imposed by law or by action of the Board of Education.

Major duties shall include the following:

1. Notice of meetings. The Secretary shall notify members of regular and special meetings.
2. Records. The Secretary shall keep true and correct records of all transactions of the Board of Education in regular and special meetings. He shall keep these records in well-bound books with numbered pages, convenient for reference, and shall furnish each member of the Board and the Superintendent with a copy of the minutes not later than at the time of the next regular meeting.
3. Elections. The Secretary shall receive nominating petitions, certify candidates to the county clerk (or Board of Election Commissioners) and perform such other duties pertaining to elections as are prescribed by law.
4. Notices and reports. The secretary shall publish notices, prepare reports, and sign documents as required by law or by regulation of governmental agencies.
5. Other. The Secretary shall perform other duties as the Board may order.

In the absence of the President and Vice-President, the Secretary shall call the Board meeting to order and preside.

Sample Policy Three—
Duties of the Treasurer

The Treasurer shall perform all duties usually pertaining to the office and such as are imposed by law or by action of the Board of Education.

Major duties of the Treasurer shall include the following:

1. Custody of school funds.
2. A cash book will be kept recording school funds and balances.
3. All school funds will be reconciled monthly and a report given to the District Superintendent and Board of Education Members.
4. Sign checks.
5. Pay bills.

the surety given is by a surety company authorized to do business in this State." Moreover, the law also provides that when the bond is received and filed by the superintendent of the educational service region, "the superintendent shall, on demand, deliver to the school treasurer a written statement certifying that his bond has been approved and filed . . ."

Sample Policy Three sets forth duties of the treasurer appointed by the school board (all counties except Cook). Laws pertaining to the treasurer are found in Article 8 of *The School Code.*

Adoption of policies

It is generally understood that school board policies continue in force until rescinded. Therefore, it is recommended that a board take formal action on its policies each year. However, many school boards consider the initial organization meeting of the new board too early to ask new members to vote on the adoption of policies. New board members need time to become familiar with the policy manual, so such action probably should be set for January or later each year.

In any event, it's important for every board of education to plan for a regular review of its policies for a number of reasons. Policies spell out ground rules for board operations and provide the superintendent and other staff with directions for running the schools on a day-to-day basis. Policies, therefore, must be up-to-date in terms of current law, current needs, and the thinking of the current board.

The School Code requires that school board rules and regulations be on file in the district office and be available for public inspection during normal office hours. This would include board policies, and the assumption is that if the policies are not on file, they have no legal force.

Another reason for regular review and formal action is to clarify what is board policy and what is not. In making decisions that establish precedents, school boards sometimes, in effect, adopt policies in their minutes but neglect to include them in their policy manuals. Then as the membership of the board changes, or as a change occurs in the central administrative staff, the policy statement in the board minutes is forgotten, and the board relies solely on the policy manual.

This may prove disastrous if an employee or student is able to produce old minutes which have not been revoked and which contain policies conferring either substantive or procedural rights.

In order to avoid this situation, boards of education may want to consider formal adoption of written policies each year with a specific provision rescinding all previous statements, whether included in board minutes or in previous policy statements. Such a motion might read as follows:

> I move that we adopt the board of education policies as submitted by the superintendent, a copy of which is attached hereto and made a part of the permanent record of the board of education, and that all previous statements, whether formally adopted by the board of education at some prior time, or adopted as a separate action of the board in the minutes of the board of education, be rescinded as of (date).

Sample Policy Four (page 16) presents a series of sample "policies on policies" from development through dissemination.

Appointing committees

Although committees are not specifically mentioned in *The School Code*, many school boards appoint committees to expedite their work. However, a committee cannot be empowered to act for the board; its authority is limited to making recommendations or advising the board. The board has no authority to delegate its discretionary powers even to a committee of board members. Committee action does not become official until the board approves it at a legal meeting. A written board policy on committees should be established. See **Sample Policies Five and Six** on page 17.

School board comittees are subject to the same "open meetings" requirements as the full board.

Standing board committees

Many school boards maintain permanent committees assigned to deal with such matters as finance, board procedures, policy development, collective bargaining, buildings and grounds, and other functions. These committees typically consist of two or three board members.

Obviously, certain tasks and projects can be handled satisfactorily by committee or the committee system would not continue to exist. Many board members contend that committees save time and reduce the burden on the superintendent.

Few observers argue with the value of temporary or *ad hoc* committees created to tackle major projects (discussed later). The value of many standing committees is questionable, however. Many of the functions assigned to standing committees are functions that could be handled with greater dispatch by the superintendent or other staff members. Consequently, standing committees put burdens on board members that might more properly be put on the professional staff.

It is admirable when board members are willing to assume these extra duties, but their productiveness is highly variable. For example, a committee assigned to develop policies or plan a program might accomplish an important task that would otherwise not get done. However, a committee assigned to supervise financial matters or buildings and grounds might simply add an unnecessary layer of bureaucracy that delays important day-to-day decisions.

There also is a tendency on the part of some standing committees to assume for themselves authority that belongs to the board as a whole. Standing committees also have been known to interfere in administrative duties, causing unhealthy friction and confusion as to who is responsible for what.

The value of standing committees, therefore, depends on how board members and the superintendent perceive their roles and their relationships to one another. Some superintendents will enjoy sharing their responsibilities with a committee; some will not.

In considering whether to create a committee, the school board should ask itself these two questions:

1) Is this a duty calling for action by the full board?

2) Is this a task that can be handled more appropriately by the administrative staff?

Some of the problems associated with standing committees can be avoided by changing personnel once or twice a year. This at least reduces the tendency of committees to assume inappropriate authority.

Ad hoc committees

There are times when an *ad hoc* or temporary committee can prove useful, provided it is estab-

Sample Policy Four—Board Policy Making

Policy Development

The Board of Education shall develop policies which shall provide the framework for District operation. The administration shall operate the District within the framework of these policies.

Adoption of new policies or changes to existing policies is solely the responsibility of the Board.

Proposals for new policies or changes to existing policies may be initiated by any Board member, by the Superintendent, or by any citizen of the District. Members or organizations of the staff may initiate consideration of policies which will be processed through regular administrative channels. The proposals shall be made in writing to the Superintendent and shall be placed on the agenda of a regular or special meeting for consideration.

The Superintendent (or his designee) shall be responsible for recasting group consensus about policy recommendations into acceptable written form for further deliberation and/or action by the Board.

The Superintendent shall seek the counsel of the school attorney when there may be a question of legality or of proper legal procedure in the development of a proposed Board policy.

Policy Adoption

Policies or policy revisions considered by the Board shall not be adopted at the meeting at which they are introduced.

Further consideration shall be given at one or more subsequent meetings before action is taken.

Temporary approval, however, may be granted by the Board in lieu of formal action to meet emergency conditions or special events which will take place before formal action can be taken.

Policy Dissemination

The Superintendent shall establish an orderly plan for preserving and making accessible printed copies of the policies adopted by the Board of Education.

Policies adopted by the Board will be filed in the administrative office of the District and made available for public inspection during regular office hours.

Sample Policy Five— School Board Committees

The Board of Education shall authorize special temporary committees as are deemed necessary. The President shall appoint such committes to act upon a specific situation or problem defined at the time such committee is created. Upon delivering its final report to the Board, the said committee shall be dissolved unless the Board renews its appointment. The President of the Board shall be an ex-officio member of any such committee.

lished for a specific purpose and with a predetermined life-span. After the committee has made its report and recommendations to the full board, it should be thanked and disbanded. The decision to create a special committee should be made jointly with the superintendent to be sure roles and responsibilities are clear and to avoid duplication of effort.

Committee of the whole

A meeting of a committee-of-the-whole usually is held in conjunction with a regular board meeting or at a special meeting. It provides an opportunity for board members to ask questions about particular issues that may or may not be on the agenda. This is a discussion-type meeting, not an action or decision-making meeting.

Citizens committees

At one time or another nearly every school district has a need for involving the community in setting a difficult goal or policy or making a critical decision. Creating and working with citizens advisory committees has become an art-form that is beyond the scope of this book. (**See Appendix H** for sources of information.) It must be noted here, however, that:

1) The role of any committee must be purely advisory to the board (or to the administration). Legally binding decisions may be made by the board of education only. Committee members must understand the advisory and temporary nature of their role from the outset.

2) The law is not specific as to the public meeting requirements of citizens advisory committees. It appears, however, that committees **advising a board** are obliged to abide by the *Open Meetings Act.* Committees **advisory to the administration or staff** may be treated as staff and hold meetings with the staff in private if that seems most appropriate.

Helping the new member get on board

A machine does not function efficiently with parts missing. A school board does not function efficiently with members who are not prepared to contribute. A school board, therefore, has a moral obligation to itself and to the community to help the newly-elected member become a contributing part of the board team.

The new board member, of course, faces an awesome task in acquiring the vast array of factual knowledge, conceptual understanding, and interpersonal skills that characterize the productive school board member. In addition to individual effort the task calls for teamwork, and many school boards establish regular procedures for getting the new member "on board" as rapidly as possible. Workshops sponsored by school board associations or other agencies can help the inexperienced board member become familiar with lawful duties and powers, school finance, and other broadly applicable matters. Much of the knowledge a board member needs, however, is available only at the local level in the form of policies, financial statements, minutes of past meetings, board operating procedures, organization plans, and the like.

Depending upon the amount of other pressing business before the board, the initial organization meeting may not be too early to begin the orientation of new members. Certainly it is not too early for the board to publicly review its written policies or procedures and plan a schedule of training sessions for the new members. **See Sample Policy Seven** on page 18.

Training and orientation sessions for new school board members need not involve all members of

Sample Policy Six— Citizens Advisory Committees

The Board of Education is charged by state law and by community interest with the function of developing the best possible program of education. It is a responsibility of the Board to interpret school needs to the community, and in turn to be sensitive to the wishes and desires of the community in respect to its education program.

In keeping with this responsibility, the Board may enlist citizen groups for assistance and counsel. Such groups shall function within the guidelines furnished to them by the Board, and their recommendations shall be understood to be advisory only. The Board cannot delegate its legal responsibility and must therefore retain authority to make decisions.

the board, although even the most experienced veteran should find the "refresher course" helpful. Typically, the superintendent and board president work most closely in orienting the new member, with help as needed from other board officers and members and other administrators.

Some school boards take steps to ensure that new members come on board with early preparation; others have found innovative ways to make new member training useful to a wider audience. Consider the following for example:

1) Plan one or a series of orientation sessions with board candidates before the election. The winning candidate will be a jump ahead in the learning process. In addition, the campaign is more likely to focus on worthwhile issues as candidates make use of the accurate information they have acquired.

2) Where possible, make formal presentations open and appealing to as many people as possible. Some school districts develop slide presentations to orient new board members and invite the public to view it, too.

School boards function properly only when members are knowledgeable. It doesn't pay to cut short the education of board members, especially those new to the job.

See the article in **Appendix A** for some useful ideas on how to help new board members and get all board members working as a team.

Sample Policy Seven—
New Board Member Orientation

It shall be the responsibility of the Superintendent to provide to new members, immediately upon their election, copies of the Board Policy Manual, the minutes of the Board meetings for the previous year, and other materials which will acquaint them with the powers and duties of the Board of Education and the operation of the school system.

The President and the Superintendent shall arrange for new members to visit with the Superintendent, with other members of the staff, and with other Board members.

New members shall be encouraged to attend workshops for new Board members conducted by school board associations, as well as meetings of such organizations.

The Board of Education will authorize the payment of registration fees and the actual and necessary travel expenses of members who attend such programs, subject to the Board's policies on travel expenses and budgetary limitations.

Orientation to the job should be considered an ongoing process for all Board members and a vital responsibility for effective Board membership.

Filling vacancies

Article 10 of *The School Code* provides that a board vacancy exists when any of the following events occur before the expiration of a member's term: The death of the incumbent; his resignation in writing filed with the secretary of the board; his becoming a person under legal disability; his ceasing to be an inhabitant of the district for which he was elected; his conviction of an infamous crime, or of any offense involving a violation of official oath; his removal from office; the decision of a competent tribunal declaring his election void.

The School Code directs the remaining members of the board to fill the vacancy by appointment until the next regular school election. At that election a successor must be elected to serve the remainder of the unexpired term.

However, if the vacancy occurs with less than 28 months remaining in the term, or if the vacancy occurs less than 88 days before the next regular school election, then the person appointed by the board shall serve the full unexpired term. Members appointed by the remaining members of the board to fill vacancies must have the same residential qualifications as their predecessors. (School boards have differing "residential qualifications" that can be confusing. Consult your attorney.)

Should the board fail to act within 30 days after the vacancy occurs, the regional superintendent of schools must fill the vacancy by appointment within another 15 days.

A systematic approach developed by one Illinois school board to expedite the filling of vacancies is described in **Appendix B.**

2. SOME LEGAL REQUIREMENTS IN ILLINOIS

School board meetings must be planned and conducted in compliance with both *The School Code* and the *Open Meetings Act*. What follows here is a review of the broad statutory requirements. Individuals assigned to draft school board policies governing meetings will need to know a great deal more about the *Open Meetings Act*, in particular, than what can be provided here.

The law on Open Meetings

The public policy of Illinois is that meetings of all public bodies, including school boards and their committees, be conducted openly. The *Open Meetings Act* requires that all meetings be held at times and places convenient to the public and provides for public notice of all meetings.

The School Code requires that a quorum of the school board must be present in order to conduct business. (A quorum for a seven-member school board is four members.) On the other hand, the *Open Meetings Act* defines "meeting" as a *majority* of a quorum—or three members for a seven-member school board. Thus, any time three members of a school board gather with the intent of discussing school business, they must comply with the requirements of the *Open Meetings Act*. Although three board members are too few to transact business, the Act ensures that the deliberations of public bodies are conducted openly. The law applies to more than official meetings where business is transacted. Discussions leading up to formal decisions, as well as the voting itself, must be in public. (Some topics may be discussed in closed metings, but other requirements of the *Open Meetings Act* apply to these meetings as well.)

Types of meetings

In general, Illinois law recognizes three types of meetings at which business is transacted: *regular, reconvened,* and *special*. Variations include committee meetings, emergency meetings, and meetings not required to be public (closed meetings).

Regular meetings—Most school board business is transacted at regular meetings held in accordance with a pre-arranged schedule. *The School Code* provides that the board at its organization meeting following each board election must determine the time and place for holding its regular meetings. The *Open Meetings Act* requires that at the beginning of each fiscal or calendar year, the school board must (a) make available a schedule of the time and place of its regular meetings, (b) post a copy of the schedule at its principal office or meeting place, and (c) provide a copy to any news medium that has filed an annual request. There also are special notice requirements when the board makes any change in its regular meeting schedule.

Special meetings—Special meetings may be held at the call of the board president or any three board members. A written notice to all board members must be given by the board secretary, and the notice must include an agenda as well as state the time and place. The notice must be served on each board member either by mail no later than 48 hours before the meeting or by personal service no later than 24 hours before the meeting.

Public notice of special meetings must be given at least 24 hours in advance by posting a copy of the notice at the board's principal office or meeting place. The notice also must be provided to any news medium that has filed a request for such notice.

Business that can be conducted at a special meeting is limited to items listed on the agenda accompanying the notice.

Reconvened meetings—A reconvened meeting is a continuation of a regular or special meeting. When the board is not able to resolve an issue within a reasonable length of time, or when more information is needed, or when the completion of an entire agenda would extend beyond an agreed-upon closing, the board adjourns the meeting to a specified day and time and continues the meeting.

A meeting is properly adjourned to a later time by adopting a motion, such as:

> I move that this meeting be temporarily adjourned and reconvene on January 17, 1982, at 7:30 o'clock p.m., in the Board of Education Office.

A reconvened meeting may be further adjourned any number of times so long as the final meeting can be traced through the minutes back to a regular or special meeting. Obviously, it would rarely make sense to adjourn a regular meeting to a date beyond the next regular meeting.

Notice of a reconvened meeting must be treated the same as a notice for a special meeting. However, no notice is required where the meeting will reconvene within 24 hours or where an announcement of the time and place was made at the original meeting and there is no change in the agenda.

Committee meetings—Committees established by the school board are considered "public bodies" and therefore subject to all provisions of the *Open Meetings Act.*

For example, a majority of a quorum of a three-member committee would be two members. Any gathering of two members from a three-member committee with the intent to discuss committee business would be subject to the *Open Meetings Act.*

Most committee meetings would be treated as special meetings calling for public notice for each meeting. Some standing committees that meet regularly might give annual public notice of a regular meeting schedule.

Emergency meetings—Faced with a situation requiring immediate attention because of threats to life, safety or security, or other matters in the public interest, the school board can declare an emergency and call a special meeting, waiving the normal 24-hour notice requirement. However, all news media that have requested notice must be notified of the meeting.

Closed meetings—School board business is public business that must be deliberated in meetings open to the public. The *Open Meetings Act*, however, provides exceptions. The school board, by adopting a proper motion, may convene in a closed meeting to discuss certain specific topics listed in the law. However, closing a meeting does not waive any public notice requirements or the requirement to keep minutes. Moreover, final actions must be taken in open meeting.

A closed meeting held as part of an open meeting for which proper notice has already been given does not require additional notice. However, a special meeting that is to be closed requires the same notice as a special meeting that is to be open.

Exceptions for which a school board, by majority vote, may close a meeting to the public include the following:

1) Collective negotiating matters between the school board and its employees or representatives;

2) Discussing or negotiating the purchase of real property or setting the minimum selling price for the sale of district real estate.

3) Pending or imminent court proceedings against or on behalf of the school district.

4) Information regarding the appointment, employment, or dismissal of an employee or officer or testimony on a complaint lodged against an employee or officer;

5) A closed session may be held when a federal regulation requires it;

6) Student discipline cases;

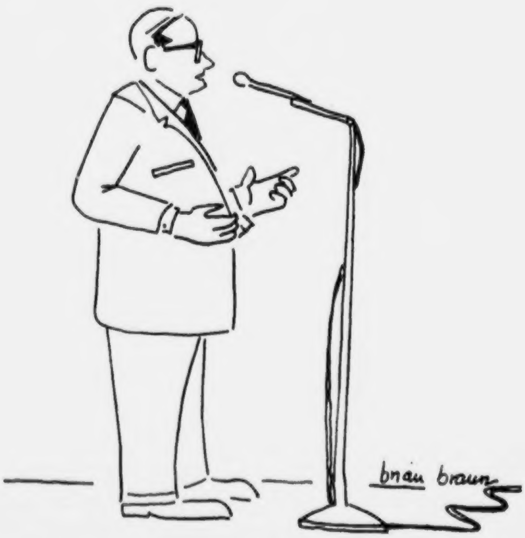
7) Matters relating to individual students in special education programs;

8) Meetings with representatives of the Illinois Association of School Boards to discuss a school board's self-evaluation, practices and procedures, or professional ethics;

9) Considering the appointment of a member to fill a vacancy on the board.

It's essential to keep in mind that the formal vote to close a meeting must be taken in public at a meeting for which public notice has been given. Thus, a school board may:

- vote at a public meeting to go into closed session immediately;
- vote to reconvene in closed meeting at some future time (with notice requirements the same as for any reconvened meeting);



Fellow Senators—I shall oppose TV cameras in the Senate, but I'll vote yes on the new open meetings law because I've been assured it doesn't apply to us.

- vote to schedule a series of closed meetings (such as collective bargaining sessions with a union), so long as none of the series is more than three months in the future.

Minutes of meetings

The School Code requires the school board secretary to "keep in a punctual, orderly and reliable manner a record of the official acts of the board." The *Open Meetings Act* requires public bodies to keep minutes of all meetings, whether open or closed, and specifies that minutes must include:

- the date, time, and place of the meeting;
- the members recorded as either present or absent;
- a general description of all matters proposed, discussed, or decided, and a record of any votes taken.

Minutes of an open meeting must be made available for public inspection within seven days after they have been approved by the board. Minutes of a closed meeting are kept confidential until the school board determines there is no longer any reason not to put them in the public record. School boards must review their minutes of closed sessions at least semi-annually and determine which ones need to be treated confidentially and which ones can be made available to the public.

Minutes are required for committee meetings as well as for meetings of the full board.

Establishing rules

The School Code requires the board "to adopt and enforce all necessary rules for the management and government of the public schools of their district." It can be assumed that this duty applies to the adoption of rules or policies for the conduct of meetings. Although the laws identified in this chapter and in subsequent chapters prescribe numerous steps that boards must follow, there remains wide discretion in the actual conduct of meetings.

The School Code also states that "Rules adopted by the school board shall be filed for public inspection in the administrative office of the district."

3. PLANNING THE MEETING

Between meetings

Most superintendents communicate regularly with board members between meetings. Memoranda, newsletters, telephone calls, and personal contacts can be used to keep board members informed about administrative problems and decisions. This practice takes time, but in the long run it can establish a better working relationship between the superintendent and the board. Also, it tends to reduce the need for lengthy reports at board meetings. There should be no surprises at the board meeting from or to individual board members.

The agenda

The successful school board meeting depends upon a well-planned agenda. An agenda saves time by clarifying the tasks before the board, preventing unfortunate surprises, and fostering the orderly conduct of business.

The agenda reflects how the board and superintendent view their respective roles and responsibilities. A school board that delegates to its superintendent the authority to manage the district and holds him responsible for results will find that its agenda includes primarily policy decisions as action items. Administrative matters may be found on the agenda as items of information, but rarely if ever for board action. A board that makes administrative decisions will find its agenda crowded with routine problems related to daily operations.

What is policy and what is administrative in nature is subject to varying interpretation. Each school board and superintendent must decide the kinds of decisions that each should make. A careful look at the board agenda will tell them whether they are sticking to their agreed-upon roles—or whether the board is making too many routine decisions—or whether major policy decisions are not being brought before the board.

Assistance in defining the respective roles of the board and superintendent is available in the IASB handbook, *Planned Appraisal of the Superintendent.* **See Appendix H.**

Preparing the agenda

Most school boards assign to their superintendents the responsibility for coordinating the preparation of the agenda. The superintendent probably has handled this responsibility satisfactorily—and the meeting will run smoothly—if:

- the agenda reflects the major issues needing school board action;
- preparation of the agenda involves board members, the staff, interested citizens and organizations;
- board members receive the agenda and related materials at least three days before the meeting;
- the agenda provides for a meeting of no more than three hours.

In this capacity, the superintendent occupies a powerful "gatekeeping" position. The agenda is prepared by the superintendent and his staff in consultation with the board president. Individual board members should inform the board president or the superintendent of items they wish to have included; they should be encouraged to suggest additional items. The agenda and supporting documents, consisting of factual data and reports, should be distributed to board members at least three days (72 hours) in advance of the meeting to provide ample time for study. Many boards include the minutes of the previous meeting. Copies of the agenda also should be sent to building principals, parent organization leaders, the press, radio and television stations, teachers' organizations, as well as other interested organizations and citizens.

The superintendent begins developing the next agenda the day after a board meeting with a review of unfinished business. He may keep a running file of activities and events to be reported or acted upon at the next board meeting. Many superintendents meet with the board president to plan the agenda for the upcoming meeting. Another typical procedure is for the superintendent and his administrative staff to meet one week prior to the board meeting and plan the agenda. Some superintendents prepare an informational letter to accompany the agenda.

An overloaded, haphazard agenda can be dangerous. Too many items should not be squeezed into a single session. As executive officer of the board, the superintendent should screen matters which various persons and groups are sending to the board. Some matters require administrative disposition and can be handled by the superintendent in line with board policy. The potential news value of agenda items also should be considered.

It is recommended that a deadline for agenda items be established, probably one week before the next board meeting. Late items, except in an emergency, should be saved for the next board meeting rather than jammed into the agenda at the last minute. Neither should fresh material litter the board table at meeting time.

It also is recommended that the superintendent and other responsible staff members go through the agenda prior to the meeting in an effort to anticipate and prepare for any problems or questions that might arise.

Recurring business

School board meetings address a wide variety of matters, many of which occur at about the same time each year. Usually the superintendent and the board secretary develop a schedule of the board's major obligations for the year ahead. In this matter, deadlines can be anticipated and met on time. *The School Code* determines a number of the dates; the board adds its own dates for meetings and a variety of personnel matters. Local circumstances create additional deadlines. A review of board minutes over the past several years will suggest a list of recurring items and the dates when they must be considered. Keeping a complete record for one year will serve as a basis for planning the master calendar for the following year. The "Master Calendar" will prove useful in identifying items for the agenda.

Some interesting insights into a yearly agenda are provided by the executive vice president of the Georgia School Boards Association in **Appendix C.**

Format of the agenda

The general format of the agenda for regular meetings should be established cooperatively by the superintendent and the board. Although school board agendas tend to be quite similar, each school district should adopt a format that will meet its needs.

It is advisable to keep *action* items clearly separate from *information* items in the order of business. For example, "old" or "unfinished" business should contain those items which the board has discussed or studied at earlier meetings and is ready to vote upon. "New" business may contain emergency items calling for board action as well as items which the board will discuss for the first time but vote on at a subsequent meeting.

Here is one typical format:

1) Call to order
2) Roll call of members
3) Approval of minutes
4) Communications and petitions
5) Visitors
6) Report from superintendent
7) Old business
8) New business
9) Adjournment

An alternate method clearly segregates items calling for school board action from those intended merely to keep the board informed:

1) Call to order
2) Approval of minutes
3) Visitors and communications
4) Action items
5) Information items
6) Unfinished business
7) New business
8) Adjournment

Here are two more variations:

1) Opening of meeting
2) Approval of minutes
3) Communications
4) Hearing of delegations
5) Committee reports
6) Superintendent's report
7) Old business
8) New business
9) Adjournment

1) Call meeting to order
2) Call roll
3) Establish a quorum
4) Approve minutes
5) Hear communications to and from the board
6) Hear communications of individuals
7) Accept the superintendent's report
8) Deal with unfinished business
9) Deal with new business
10) Bring up any miscellaneous matters
11) Adjourn

When an agenda format has been agreed upon, board policy should call for a majority vote in order to alter or temporarily suspend the order of business.

Additional ideas on agenda development are presented in **Sample Policy Eight.**

Locating agenda items

It is considered good practice to dispose of routine items early in the meeting. Also, action items probably should occur before information items, recognizing that people have a limited concentration span. People are usually livelier and more creative at the beginning of a meeting than at the end. So if an item demands considerable thought, it probably should be taken care of before energy levels drop.

At the same time, if it seems likely that one topic might dominate a meeting, it may be better to hold it awhile and get some other priority work accomplished first.

Problems are created when a board spends too much time on small emergencies and gives short shrift to important, long-range subjects.

Scheduling time

Although it may not always be possible to adhere to it, a time schedule keeps the meeting moving. It's a good idea to put the finishing time on an agenda as well as the starting time (e.g., meeting starts at 7:00 p.m. and ends at 10:00 p.m.). In estimating the amount of time needed for each item, experience is probably the best teacher. It is difficult to predict accurately how much time will be spent on an item. Naturally, the time schedule should not be adhered to at the expense of giving careful consideration to important matters. Meetings should not last longer than two or three hours.

A number of boards take a brief recess midway through the meeting. During this time they can relax with refreshments and talk informally with visitors.

Supporting documents

Superintendents are properly expected to make policy recommendations to the board. The board needs comment and advice from the administration on every agenda item. These comments and advice can be in the form of the superintendent's letter or an administrative staff memorandum. Although the board may act otherwise, having the superintendent's recommendation—together with supporting documents—sharpens the issues, provides precise wording for certain motions and resolutions, and speeds action at the meeting. Recommendations should be stated in language that can be incorporated into motions; they should offer the exact wording of motions where

Sample Policy Eight—Board Meeting Agenda

The agenda for Board meetings shall be prepared by the Superintendent in consultation with the President. Items submitted by Board members to the Superintendent or the President shall be placed on the agenda. Others may convey suggestions for possible inclusion on the agenda. Such suggestions must be received by the superintendent at least one week prior to the Board meeting.

Items for discussion or action may be added to the agenda at the start of any regular meeting at the request of the Superintendent or any Board member upon majority approval of those members present.

Copies of the agenda shall be mailed or delivered with adequate data and backup information to each Board member at least 72 hours prior to each regular meeting.

Board members shall be expected to read the information provided them, and to contact the Superintendent to request additional information that may be deemed necessary to assist them in their decision making responsibilities.

Copies of the agenda shall be available at the meeting for the convenience of visitors.

The order of business at regular Board meetings shall be:

1. Call to order.
2. Roll call.
3. Approval of minutes of previous meeting.
4. Financial report.
5. Approval of bills.
6. Committee reports.
7. Report of Superintendent.
8. Recognition of public.
9. Communications to Board.
10. Unfinished business.
11. New business.
12. Announcements.
13. Adjournment.

Upon consent of a majority of members present, the regular order of business at any meeting may be suspended.

possible.

The superintendent in a small district probably will write most of the supporting documents for action items on the agenda. In larger districts, the commentary on each subject may be written by the administrator in charge of that area of school operation. Usually, such writing should represent the superintendent's viewpoint. When a viewpoint going to the board is independent of the superintendent—such as from an advisory committee, consultant, or employee union—the superintendent should also give his views either orally or in writing.

Other enclosures

A variety of reports of every description may be enclosed with the agenda. These documents flow into every board office in a heavy stream. The superintendent is responsible for their screening and distribution: some go into the waste basket; many are diverted to other administrators; many are sent to the board. When the enclosure relates to an action item on the board agenda, the superintendent will need to provide an explanation. Some enclosures are sent without interpretation when they are merely for the board's information.

Enclosures fall into two broad categories: those originating within the school system, such as reports from principals, department heads, the head custodian, the board secretary, or the treasurer; and those originating outside the system, such as reports, letters, and requests from government agencies, community committees and organizations, and individual citizens. All should be prepared in the weeks preceding the meeting. Copies can be collected and held in reserve long before the agenda is completed. The enclosures can be organized and collated for mailing with other material.

Priority goes to the reports and requests which provide background for board decisions. They must be included with the meeting material in every case. Next in importance comes material which informs the board about the impact (results) of its policies, then those which will need action in coming weeks, and finally those which improve the board's overall understanding of education and its own functions. If time is running out and some reports cannot be finished soon enough for the meeting, they should be worked on in the above order and leftovers postponed until the next meeting.

It takes time to teach good agenda-making procedures to the staff, to the public, and to individual board members. At first, the effort to plan ahead may seem unnecessary, but as time passes and the board finds itself gaining more time to discuss important issues with the staff and with the public, the value of a carefully planned agenda will become evident.

BOARD PRESIDENT

The popular decision is to vote no on the motion, the just decision is to vote yes, the easiest way is to abstain, and what I'd really prefer to do is adjourn.

Distributing the agenda

School systems employ a variety of agenda distribution plans. The agendas are mailed to the board members, newspapers, radio and television stations, and representatives of interested employee and citizen groups and presidents of the local PTAs on a Thursday or Friday, for example, of the week prior to a Monday or Tuesday board meeting. Some deliver them by hand or through messenger service. Agendas also are posted in school buildings and copies sent to all school administrators in the system. Of course, the agendas should be delivered to the board members before they are released to the press or any other recipient. The board and the superintendent should jointly determine who will receive copies of the agenda and supporting materials.

Most school districts rely upon newspapers and radio publicity through general news releases to inform the public about meeting topics.

Board meeting agendas also are among the official documents that must be sent to individual subscribers on the mailing list required by Section 10-21.6 of *The School Code*.

The meeting room

Illinois law requires governmental bodies to meet at specified times *and places* that are convenient to the public. Most school boards specify a meeting room that is part of, or adjacent to, the district's central administrative offices. Some board meeting rooms are specially designed for meetings. Some double as conference rooms for the staff, while others are an extension of the superintendent's office. Boards in many small districts meet in cafeterias, multi-purpose rooms, or other settings that serve other uses when the board is not in session.

All of these sites comply with the law because they are convenient to the public and they are specified when the board announces its schedule of regular meetings. Apart from the question of public convenience, the place where the board meets is important because physical arrangements can affect the conduct of business.

Because of the range in the sizes and resources of school districts, it is difficult to recommend "the ideal" physical facility for the board meeting room. However, administrators and board members charged with the responsibility for providing this facility should recognize the importance of the board meeting environment.

Some of the general considerations include:

1) Parking facilities should be ample, well-lighted and close.

2) There should be ready access to school records (minutes book, budget documents, policy manual and administrative rules and regulations), *The School Code of Illinois*, and *Robert's Rules of Order* (Revised Edition).

3) Coat racks should be adequate and conveniently located; they may be permanent or moveable.

4) Restrooms should be readily accessible.

5) The room should be large enough to comfortably accommodate everyone who attends, including the normal provisions for board members, staff, news media people, and whatever audience is typical for the district. In the event of an unusually large crowd, a larger facility located near the board room should be available.

The physical setting can contribute heavily to the tone of the meeting. The room should be well lighted, ventilated, and kept at a comfortable temperature. Consideration should be given to the color scheme and appointments. A comfortable, pleasant atmosphere should prevail. Wall-to-wall carpeting improves both the appearance and the acoustics.

The board meeting room should be comfortable, but not sumptuously furnished. Seating arrangements for visitors should be comfortable. Visual aids that are frequently used—such as wall charts, district maps, overhead transparencies and filmstrips—should be easily accessible.

Everyone present should be able to see and hear others in the room. The board and the superintendent should be seated where they can be easily seen by the audience. The table at which the board members sit should be large enough so that they can spread out their papers. Comfortable chairs, water, ash trays, large-type name plates, scratch pads and pencils should be provided for each member. In a large room a public address system should be provided with sufficient microphones so that each board member can be heard. A floor microphone and a lectern may be provided for public participation.

A variety of seating arrangements are in practice. There is considerable interest in seating arrangements which permit maximum visibility to the audience. Most boards sit in an open alphabet arrangement facing the audience (board table shaped in U, T, V, or I).

Various seating arrangements, along with their advantages and disadvantages, are illustrated in **Exhibit B.**

The major criteria for selecting a seating arrangement should be:

- Can the audience see and hear all members of the board?
- Can all members of the board establish eye contact with one another?

Improved sight and sound can be obtained in some board rooms by elevating the board table on a platform or stage.

Careful consideration also should be given to the news media. They should be made to feel welcome and be provided with the necessary facilities to do their work: a comfortable chair at a table at the front of the room, pencils, paper, ash tray, and drinking water. Coffee and other refreshments should be conveniently available. A complete agenda plus copies of relevant background materials also should be provided.

Security

When a large crowd is expected to attend a school board meeting, some common sense security measures are in order. Citizens coming on school district property are, in a sense, the guests of the school board and are entitled to reasonable efforts to provide for their safety. Moreover, where a controversy is involved, the board may want to ensure its ability to maintain order and conduct the business at hand.

Security measures, of course, will vary from community to community. Here are some items for boards to consider:

1) Steps should be taken to ensure that buildings and grounds are safe and well-lighted.

2) A member of the administrative staff may be assigned responsibility for knowing emergency telephone numbers—ambulance, hospital, police, fire department, or para-medical services.

3) The police department may be requested to have personnel on hand throughout the evening or the board can hire special security staff for this purpose.

4) Every member of the board should be aware

that, in desperate circumstances or as a last resort, the board president can and should obtain police assistance to maintain order. Such occurrences are so rare that a board anticipating any difficulty would be well-advised to have its attorney on hand to ensure that the board is on sound legal ground in obtaining police assistance.

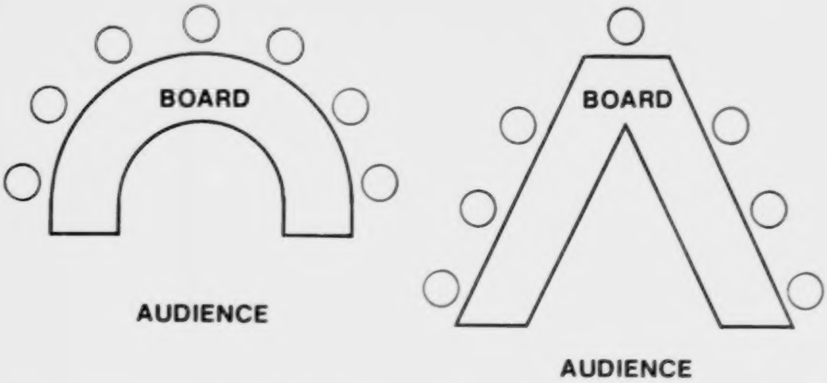
Planning interesting meetings

School boards are often portrayed as dealing only in dull matters that have little to do with students and learning. And it's true that boards are required to perform numerous duties holding little or no interest for the average citizen.

Unfortunately, some boards never get beyond the routine, the ministerial, or the trivial. The few people who attend the meetings of such boards find the proceedings about as interesting as watching grass grow.

On the other hand, the boredom of routine ministerial actions would probably be welcome to the school board that's constantly beset with controversies and pressures from special interest groups. Illinois school boards experience such a wide variation in public response that some boards are trying to attract more people to their meetings while other boards are privately wishing more

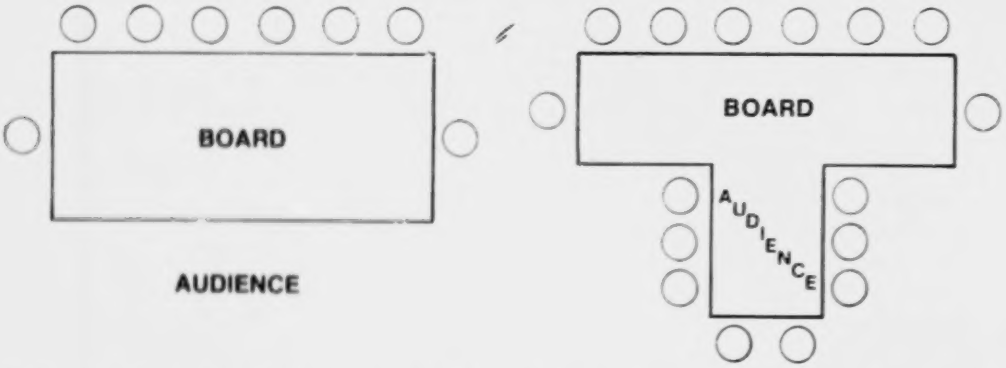
Exhibit B—Seating Arrangements for Board Meetings



This arrangement is perhaps ideal; the audience can see each member of the board, yet board members can speak directly to one another with good eye contact.

This variation is also close to ideal. The difference is in the V-shaped table, which retains good eye contact among board members as well as between the board and the audience.

Encircling a table probably establishes the best eye contact among members, but it isolates the audience. It's useful for boards that attract no visitors to meetings.



Putting board members along one side of the table opens the meeting up so the audience can see and hear. However, eye contact among members is made more difficult. Board members speak to the audience and not to one another.

Tables arranged in a T may be useable with a small audience. However, eye contact among board members is not good with this arrangement, and some members of the audience may forget they are there to observe, not deliberate.

people would stay home.

The problem facing the majority of school boards is that the tone of their meetings is set by people and forces other than the board itself. The typical school board reacts to whatever drama unfolds once the meeting begins. However, those boards that choose to do so find they are able to establish and maintain a positive tone for their meetings no matter what topics or problems might come up. Part of their formula for successful meetings lies in adopting and following effective rules of order. Another part of their formula consists of an effective presiding officer. Still another part is skillful communications planning.

Recognizing that the best defense against boredom and chaos alike is a good "game plan," some boards and their administrative staffs consciously set a positive tone for each board meeting. While every board agenda includes problems that have to be solved and duties that have to be performed, school boards concerned about their public relations find ways to accentuate the positive. It helps, of course, if someone on the board or administrative staff has a flair for showmanship—namely, the ability to plan public presentations in a way that entertains and gets a message across.

Here are some examples:

1) Focus on programs. Have staff members explain the benefits or results of an instructional program. Use charts, slides, film strips, or whatever props might help demonstrate the program.

2) Focus on students. Involve students in ceremonies to open the meeting (e.g., present the flag, Pledge of Allegiance). Call attention to top students with awards or stage an old-fashioned spelling bee. Take every opportunity to recognize commendable performance by individuals or groups.

3) Focus on teachers and other staff. People like to know what's going on in the classrooms—and board members need to know, too. Some teachers are truly gifted at explaining what they are doing and why it's good for students.

4) Displays. Some boards go to great lengths to set up exhibits of student work, school projects, effective programs, or explanations of important concepts (bus routing, if that's important locally). The exhibit can be briefly explained or discussed at an appropriate time during the meeting. Moreover, such exhibits can then go "on the road" to businesses, clubs, churches, and other locations to reach an even wider audience.

5) School board honors. A successful school district represents the efforts of many people, salaried and non-salaried. Nothing could be more positive or do more to dramatize the school oard's values and priorities than giving frequent thanks to those who serve the schools. Citizen volunteers and employees alike deserve recognition for dedicated service. A special time on every agenda can be reserved for honoring individuals who are retiring, members of advisory committees, and parents who help out at school. Gestures ranging from trophies and plaques to simple resolutions are no doubt equally appreciated if presented with a sincere statement of gratitude.

Whatever devices a board might select to focus on the positive at meetings, there are several keys to success:

1) Select topics for special programs that people want to know about. This means careful listening to the questions that people ask. Some school districts use opinion surveys. Focusing on things that people don't care about is a major source of boredom and leads school officials to wrongly conclude that people are apathetic. People are not apathetic about schools. They just see things from a different angle than do professional educators.

2) Publicize special events at board meetings and work at building public interest in them. There is very little in this world that sells itself.

3) Put the special event near the top of the agenda. This not only sets a positive tone for everything that follows, it won't force people to sit through routine board business that they don't care about. (To say that all citizens should be interested in budgets, buses, bills and bond issues is idealistic, but not very realistic.)

4) Don't overdo it. The special event should be to the point and long enough to get across its message. But it should not force the board to meet beyond a reasonable hour of adjournment. Boards that regularly use special events may not get by with just one meeting a month.

See **Appendix D** for more tips on using the board meeting as a public relations tool.

4. CONDUCTING THE MEETING

Board officers

If the president is absent or refuses to perform duties of the office, the vice president chairs the meeting. If the secretary or clerk is absent, a secretary *pro tem* must be appointed to either record the minutes or assume responsibility for the work of someone else who records the minutes.

Temporary officers serve for only the one meeting.

Establishing a quorum

School board business may be transacted only at lawfully constituted regular or special meetings. There appears to be no specific limitation as to the business that can be conducted at a regular meeting. A special or reconvened meeting is limited to items listed in the agenda accompanying the official notice.

The transaction of business requries the presence of a quorum, which is a majority of the board membership. For a three-member board of directors, at least two members must be present; for a seven-member board of education, at least four must be present.

If a quorum is present, the board may proceed to the business at hand. If a quorum is not present, a meeting cannot be held. Once the roll call is completed, the presiding officer declares that a quorum is not present and adjourns the meeting. Business must await the next regular meeting or until a special meeting is called.

Methods of action

Most matters coming before a school board are acted upon following a motion and a second. The substance of the motion is generally stated orally and written into the minutes by the recording secretary.

In some instances, *The School Code* prescribes that action be taken by a resolution containing findings of fact or provisions for certain acts to be performed by school district officials. In such cases *The School Code* must be carefully followed. Where a resolution is required, the motion and second should be to adopt a resolution prewritten to conform to legal specifications. A resolution also is appropriate for giving complicated instructions or for covering a number of items in a single action. **Exhibit C** (page 30) provides two examples of school board resolutions.

Resolutions, of course, become an integral part of the minutes.

Deliberating proposed actions

On issues requiring board action, some school boards require that a motion or resolution be properly introduced before engaging in discussion. Most boards, however, seem to feel this requirement is an unnecessary formality and prefer to let the deliberations lead into a formal motion for action. There are no laws bearing on this choice of procedure.

Requiring a motion prior to discussion is one way to speed-up the meeting, because it quickly identifies what the discussion is about and tends to prevent digressions. However, the requirement assumes that someone (usually the superintendent) has thoroughly researched the issue and is prepared to make a recommendation. Where the school board itself must talk out a complex question and arrive at an answer, the formal motion for action often cannot come ahead of the discussion.

On some issues, leading off with a motion can create other negative side effects. The motion assumes there are two clear-cut positions on the matter—you're either for the motion or against it. Board members can influence one another's views through discussion, but they can move to a middle ground only by amending the original motion. De-

Exhibit C—Typical School Board Resolutions

Resolution to Levy Certain Special Taxes

BE IT RESOLVED BY THE BOARD OF EDUCATION, SCHOOL DISTRICT NO. ______, COUNTY OF ______, STATE OF ILLINOIS, as follows:

SECTION 1: That for the next ensuing year, the County Clerk of ______ County is hereby authorized and directed to extend the following special taxes in behalf of this School District:

(a) the sum of $______ to be levied as a special tax for Working Cash purposes; and

(b) the sum of $______ to be levied as a special tax for Illinois Municipal Retirement purposes; and

(c) the sum of $______ to be levied as a special tax for Fire Prevention and Safety purposes; and

(d) the sum of $______ to be levied as a special tax for Special Education Building purposes.

ADOPTED this ____ day of ______, 19____.

____
President, Board of Education

Ayes:
Nays:
Absent:

ATTEST:

____
Secretary, Board of Education

Resolution Authorizing Notice to Remedy

WHEREAS, this Board of Education has received reports from the administration regarding the teaching performance (*conduct*) of (*name of teacher*), a teacher of this School District;

WHEREAS, this Board herewith finds and determines that such reports state causes, charges, reasons, and defects in the teaching performance (*conduct*) of (*name of teacher*), which if not removed are causes, charges, and reasons warranting discharge and dismissal of (*name of teacher*) as a teacher in this School District; and

NOW, THEREFORE, Be It Resolved by the Board of Education of ______________ School District Number ______, ______________ County, Illinois, as follows:

SECTION 1: That the President and Secretary of this Board of Education are hereby authorized and directed to sign and serve or cause to be served, on behalf of this Board of Education, upon (*name of teacher*) a Notice to Remedy substantially in the form of Exhibit A attached hereto and made a part hereof, which notice enumerates causes, charges, reasons, and defects which this Board determines, if not remedied, may result in the discharge and dismissal of (*name of teacher*) as a teacher in this School District.

SECTION 2. This Resolution shall be in full force and effect forthwith upon its adoption.

ADOPTED this ____ day of ______________, 19____, by the following roll call vote:

Ayes:
Nays:
Absent:

____
President, Board of Education

____
Secretary, Board of Education

pending on the relationship among the board members, there may be a tendency to come down hard on one side of the motion or the other. Yet, experience suggests that the best decisions are those that result from free deliberation and represent the combined thinking of all board members. An early motion can be counterproductive when the board needs to function as a "think tank" on a particular issue.

The early motion, however, appears to be a real help on routine business items or on items where the board expects the superintendent to exert strong leadership through research and recommendations.

Voting

A school board takes action by voting. If the minutes of the meeting do not show the results of a formal vote, no action was taken in the eyes of the law.

Where there is a motion on the floor, and sensing that productive discussion has run its course, the president calls for the vote. As a member of the board, the president also is expected to cast a vote on each motion. The prevailing vote represents the decision of the total board, even if the margin is 4 to 3 or 2 to 1.

Voting order—The board should establish a sequence for voting. One possibility is for the board secretary to call names alphabetically. Under this arrangement the same sequence is following on all votes—Mr. Adams votes first and Mrs. Zielinski votes last. Both Mr. "A" and Mrs. "Z" may feel a bit uncomfortable in these permanent positions. A possible solution would be to move down the alphabet on each vote so that the voting begins and ends with a different board member each time. Another plan would be to vote sequentially around the table; again, the first and last member could be changed with each motion.

It is mandatory for all members present to vote on a motion. They may vote "yea," "nay," or "abstain." (There are times when a member cannot come to a comfortable conclusion and decides not to vote, but abstaining lends strength to the majority.)

Vote required to carry a motion—When a vote is taken on a motion before the board and a quorum is present, a majority of the votes of the members voting "yea" or "nay" determines the outcome. In the event of a tie vote, the motion is lost.

Should several members abstain from voting, if a quorum is present, a motion may be carried—or defeated—by the vote of those who actually voted, even though only one in number. That is, if six board members abstain, one member can pass or defeat the motion.

In some instances, the relevant statute provides that the proposition must be carried by a majority of all board members, not merely those voting on the proposition. These statutes constitute exceptions to the general rule.

For example:

- Dismissal of a tenured teacher requires a majority vote of all board members; that is, on a seven-member board, four affirmative votes are required to dismiss.
- Leasing equipment or property requires a two-thirds vote of the full board; that is, five affirmative votes on a seven-member board. A similar vote is required in order to lease school property to another governmental body.

Roll call—All questions involving the expenditure of money require a roll call vote, with the "yea" or "nay" of each member recorded in the minutes. *The School Code* uses the words "involving the expenditure of money." Even though the immediate action taken does not call for an expenditure of money but might subsequently result in money being spent by the school district, the vote of each member must be recorded. For example, the board might vote to establish a source of supplies or to adopt a new remedial reading program. Neither action results in an immediate expenditure but both probably will "involve the expenditure of money" at some future time. Thus, a record of individual votes is called for.

It is recommended that this procedure be followed on all substantive issues so that the vote of each member is indicated in the record.

Rescinding a board action

A school board may rescind action it has taken unless, by reason of that action, persons have acquired rights which would be prejudiced if the action were nullified. However, it is not legal to rescind or alter a board action simply by rewriting the minutes that recorded the action. The board must vote on a new motion rescinding the earlier action.

To avoid having to deal with the same issue over and over, many boards require the following steps to rescind an action:

1) A motion to *reconsider* the earlier action must be introduced by a board member who had voted with the majority on the original question.

2) If the motion to reconsider is adopted by majority vote, then the president may entertain a second motion to rescind the earlier action.

This two-step process avoids confusion by addressing the concern of board members who may question whether the matter should be reconsidered at all.

Striving for agreement

On critical issues, such as the employment of a new superintendent or the decision to hold a tax referendum, many boards strive for a unanimous vote. A new superintendent needs to begin the new job with support from the entire board. A split vote on a decision to hold a referendum for a new building or a tax increase could guarantee the proposition's defeat. (If the board is less than 100 percent behind a critical need, how can taxpayers be expected to support it?)

On such issues, it is recommended that both sides compromise by moving to a middle ground where everyone can stand. Strive for consensus rather than majority rule, even if it means adopting everyone's second choice.

Unanimous votes supporting the superintendent's recommendations on routine agenda items may be typical, but not essential. Board members should vote their individual consciences on all matters, rather than form a coalition and vote alike on all issues. Political factions can be damaging to effective board operations. A 4-to-3 vote is not a problem unless the same persons vote as a block on most issues. A skillful board president will strive for a consensus, getting a motion on the floor that all—or nearly all—can support. For some constructive suggestions in this regard, see **Chapter 7** and the article in **Appendix A.**

Parliamentary procedure

Although *Robert's Rules of Order Newly Revised (*Scott, Foresman and Company) provides a systematic method of conducting school board meetings, a local school board may establish its own procedures for carrying out its business, so long as the procedures are in compliance with *The School Code.*

For example, a board may adopt a rule which permits the president to make or second a motion without leaving the chair, a rule that motions not require a second, and other procedures which meet its needs and wishes. A board of education can operate quite informally—and effectively—so long as it agrees on these procedures and incorporates them into its written policies.

The following guidelines may prove helpful in writing such procedures:

1) A board should agree on and adopt an agenda format that it will follow at regular meetings.

2) Action items on the agenda require:

- a motion by a board member;
- a second to the motion (required by most boards, but not all);
- a discussion of the motion by board members;
- a vote by board members

3) Each motion should be limited to one idea or issue.

4) No new motion may be made while another is being discussed.

5) A motion may be amended and votes on the amendments must be taken before acting on the original motion.

6) Before a vote on a main motion is taken, business can be interrupted by a motion:

- to table the main motion;
- to postpone action;
- to refer the motion to a committee;
- to withdraw it from consideration;
- to adjourn the meeting.

These subsidiary motions must be disposed of prior to action on the main motion.

7) Debate can be closed formally with a motion to move the question and a two-thirds affirmative vote.

8) When the president senses the discussion has ended, a vote may be taken without a formal motion to close debate unless a member objects.

9) Some motions are not debatable, such as a motion to adjourn or to appeal a decision to the chair. See the "Quick Reference and Guide to Parliamentary Procedures" in **Appendix E.**

10) A member—but no one else—may rise to a point of order at any time. After the point is stated, the president issues a ruling which may be appealed to a vote of the full board. Board policy should specify the number of votes required to over-rule the president or to suspend a rule.

11) Before a motion is voted upon, it should be read aloud by the secretary.

12) The president, by virtue of membership on the board, is expected to vote on each issue before the board.

13) The president should indicate before each vote whether a simple or special majority is required.

14) The president should keep readily at hand a reference guide, such as the one in **Appendix E.** For unusual problems, *Robert's Rules of Order Newly Revised* also should be available.

It should be noted, however, that in his 1973 book, *Parliamentary Procedure: Tool of Leadership,* King Broadrick offers this advice which can be applied to school board meetings:

> Slavish dedication to parliamentary law "is likely to be nonproductive if not actually dis-

> ruptive . . . you are soon in trouble if you interpret the manual literally. The hazard of literal and legalistic interpretation is that it will tend to make procedure more prominent and thus more important than the substantive issues under discussion."

A regular meeting scenario

When the president calls a regular meeting to order, much of the work should already have been done. The administrative staff has compiled information regarding each item of business and distributed it to members of the board. Members should have studied the material in advance, know the questions they want to ask, and begin to form their views by the time the meeting starts. (It's good practice for board members to reserve final judgment on issues until the full board has an opportunity to deliberate.)

Each school board is free to establish its own order of business and rules of order, but the following scenario is more-or-less typical of how an Illinois board might deal with routine business.

1. **Call to order**
   President (rapping for attention): "The meeting will now come to order."

2. **Roll Call**
   President: "The secretary will call the roll."

The secretary is required to record in the minutes the names of members present and those absent. If a quorum is present, the board proceeds to the business at hand. If not, no business can be legally transacted and the meeting must be adjourned.

3. **Approval of the minutes**
   President: "Are there any corrections or additions to the minutes?"

At this point a member is free to suggest any changes that may be more in accord with the facts or other changes in the interests of clarity or accuracy. If not, approval of the minutes is usually done informally, although a formal motion is in order. To save time the president may state: "The minutes will be approved as read" (or "as written," or "as corrected," or "as amended," as the case may be).

(Note: Most school boards save a great deal of time by having minutes distributed with the agenda packet, eliminating the need to read them at the meeting.)

The minutes must always reflect the truth and must state exactly what action was taken. Any action of the board may be reviewed, reconsidered, reversed or rescinded by vote on a new motion. Failure to approve the minutes of a meeting does not rescind any previous action, because the sole purpose of the minutes is to relate what happened. Failure to approve the minutes cannot change what actually occurred. Neither may any board action be rescinded nor altered by amending or correcting the minutes because the minutes would not then truthfully state the facts. **See Chapter Six.**

4. **Monthly report of the school treasurer.**

The school treasurer is required by law to render a monthly report to the board of education showing the balances on hand as of the last report, cash received, cash spent, and balances remaining.

5. **Monthly statements of budgetary items and extra-curricular funds.**

6. **Approval of current bills for payment.**
   Any member: "I move that the current bills as read (or "as shown on the list submitted" — in the amount of $____ be approved, so entered in the minutes, and orders drawn for their payment."

   Another member: "I second the motion."
   President: "Is there any discussion?"

The vote on this motion must be by roll call and a record of the vote by individual members included in the minutes. All bills approved by the board for payment must be shown in the minutes. A certified copy of that portion of the minutes, signed by the president and secretary or a majority of the board, authorizes the school treasurer to issue checks in payment of the approved bills.

In a few small districts, members of the school board physically examine the bills themselves at the meeting before voting to pay them. In other districts, the secretary, president, or finance committee chairman examines the bills and reads aloud at the meeting. Both procedures are time consuming and legally unnecessary.

The most common practice is to distribute a list of bills with the agenda packet. Board members can examine the list and direct inquiries to the bookkeeper or business office in advance of the meeting. Meeting time can be reserved for discussing only those bills that present difficulty or disagreement.

Some board members feel it is not productive to haggle over the current bills because bills have to be paid anyway. However, members should satisfy themselves that the expenditures have been authorized by general board policies or specific board directives. (Board policies typically authorize specific administrators to make purchases of specific types or within specified amounts.)

School boards that do not have sophisticated business departments also find it worthwhile to challenge what appear to be excessive charges for goods or services. However, trained administrators should be in the best position to evaluate the fairness of bills before they are presented to the board for payment.

Also, if the board has established revolving funds, such as those for the cafeteria or petty cash, there must be submitted to the board a monthly report of receipts and disbursements. All reimbursements to any revolving fund from district funds must be completely itemized as to whom paid, for what purpose, and against what budgetary item the expenditure is chargeable.

7. Approval of current payroll for payment.

Any member: "I move that the payroll for the month of ______ in the amount of $______ be approved, so entered in the minutes, and orders drawn."

Another member: "I second the motion."

President: "Is there any discussion?"

The vote on this motion must be by roll call and the vote of individual members recorded in the minutes.

Most school employees work under annual contracts, meaning that the board approves their salaries once each year. This annual approval must be clearly recorded in the minutes (yeas and nays), and salary schedules and individual contracts must be incorporated in the minutes directly or by reference. Once the various salary schedules, contracts, and other wage arrangements are approved and recorded, the board need not take action on individual pay at subsequent meetings unless alterations are called for. The initial action at the beginning of the fiscal year authorizes the payment of salaries and wages each pay period to the specified employees.Therefore, most school boards need to authorize regular payroll disbursements by adopting a report or resolution that specifies the total dollar amount for each fund or account rather than for each individual employee. Recorded in the minutes, approval of the payroll report or resolution authorizes the issuance of checks in accordance with existing contracts and wage agreements.

The board, of course, may be called on to approve payments to substitute teachers and other temporary employees from time to time.

8. Report of the superintendent.

As the chief executive officer of the board, the superintendent should be called upon to make regular monthly reports. Many of the issues or problems he presents may have a direct bearing on decisions to be made in connection with the committee reports which follow.

The superintendent also may present to the board communications from any accrediting or governmental agency. (This would include, for example, reports received from the State Board of Education, the State Department of Health, or the North Central Association.) Also, any communications or reports from local organizations which have demonstrated their interest in public education and their desire to coordinate their efforts in a contructive way with the school district should be presented to the board by the superintendent at this point in the meeting.

9. Reports of committees.

President: "We will now hear the report of the ______ committee."

The president of the board calls for a report from each committee chairman, standing committees first, if any; then any special committees that may be at work. If the committee chairman is not present, the president may ask a member of the committee to report.

Not all school boards use standing committees, of course. **See page 15.**

Any committee recommendations or proposals calling for school board action should be presented later—expressed in proper motions—under "New Business" or "Action Items." Where a committee report includes a motion for board action, some boards prefer to hold the entire report until the action portion of the agenda.

Probably the most effective procedure, however, is to receive the committee's report and recommendations at one meeting and put the matter on the agenda of a subsequent meeting for action. Members of the board need and deserve time to consider any new proposal, unless it is minor or an emergency.

Many boards, by policy, require that important issues be presented as new business at one meeting and voted upon as old business at a subsequent meeting. A committee report can fall into this category, depending upon how much time board members need to study the matter.

If the committee report simply provides information and includes no recommendation for action, of course, no vote is required.

10. Public hearings and petitions.

President: "We have with us tonight ______ (naming the individuals or organizations waiting to be heard) who wish to present a matter for consideration by the board."

The president may indicate the nature of the business if he knows what it is.

Occasionally individual citizens or committees representing service and civic organizations request to be heard at meetings of the school board in order to present some matter on which action by the board is desired. The school board, by policy, may require that such requests be made through the secretary of the board or the superintendent and that the nature of the matter to be presented be indicated on the agenda.

In addition to being a legal requirement (Section 10-16 of *The School Code),* it is generally conceded to be good public relations to afford individuals and organizations every reasonable opportunity to make their desires known and express their views. To what extent the board shall give ear to these expressions of views and petitions is for its members to determine. (**See Chapter 8.**) It is likewise a matter for the board to decide what action, if any, is warranted or desirable after the petitioners have been heard. Most boards, by policy, reserve action until a later meeting.

11. Notices and communications.

President: "Has the secretary any notices or communications that should be presented to the board at this time?"

Petitions and special requests are occasionally received by the secretary through the mail. These or any other communications which might properly be considered by the board as a whole should be read by the secretary at this time. (To save time, communications can be distributed with the agenda and the oral report eliminated.) Should any matter presented warrant action, the proposal should be embodied in an appropriate motion under "New Business."

12. Unfinished business.

President: "Is there any old or unfinished business that should come before the board at this time?

Unfinished business includes:

- any business pending and not disposed of at the preceding meeting, unless laid over by regular motion and vote for consideration at some other specified time, or
- matters previously postponed by regular motion and vote and set ahead for consideration at this meeting.

13. New business.

President: "We are now ready to consider new business which may properly come before this meeting."

The agenda should list items of new business coming before the board for deliberation and possible action. The agenda or supporting material should include the superintendent's recommendation for handling each item. It is frequently appropriate to refer new business items to the superintendent or a committee for further study prior to final action at a later meeting.

Under "New Business" the board also considers motions resulting from requests and petitions presented earlier in the meeting.

14. Announcements.

President: "Has the secretary any announcements to report?"

This may include a call for a special meeting of the board, announcement of special school events, parent-teacher meetings, civic meetings, school board association workshops, or similar news.

15. Adjournment.

President: "If there is no further business to come before the board, the meeting stands adjourned."

The meeting also may be adjourned upon the passage of a motion to adjourn made by one of the board members.

16. Adjourned meetings.

Discussion of a particular item of business often cannot be completed at the one meeting. Perhaps additional information is needed before action is taken. However, if the matter cannot wait until the next regular meeting, a motion to adjourn and convene again at a specified time and place is good procedure. This eliminates the legal necessity for notifying members of a special meeting.

Note that public notice, including an agenda, must be given at least 24 hours before a reconvened meeting as well as for a special meeting. However, public notice is not required where the meeting is to be reconvened within 24 hours or if the time and place of the reconvened meeting were announced at the original meeting and there is no change in the agenda.

5. DUTIES AND RESPONSIBILITIES

The board president's responsibilities

According to the Policy Handbook of the Taylorville, Illinois, School Board (1980), the board president has the following responsibilities:

> "The President of the School Board shall preside at Board meetings, shall perform all duties imposed by the statutes, and shall perform such other duties as may be prescribed by law or by action of the Board of Education. The President shall decide, at Board meetings, questions of order. The President shall have the same right as other members to offer resolutions, to make motions or second motions, to discuss questions, and to vote thereon."

The board president's most visible responsibility is to preside at meetings. The president plays a key role in the successful operation of a board of education meeting. He sets the tone and climate for the meeting through fair, reasonable and impartial treatment of all board members. A good sense of humor is a genuine asset. When board meetings deal with highly controversial issues, when a discussion of a routine matter suddenly becomes charged with emotion, or when an irate speaker makes derogatory remarks about the board or superintendent, the ability of the president to remain calm and keep the meeting under control is essential. **See Exhibit D.**

The board president also should possess basic skills in presiding, know parliamentary procedure (but not be overly formal in its application), and understand the legal aspects of public meetings to ensure compliance with the law.

In addition to all the above, the president should vote on all issues. On some school boards the president votes only to break ties. If not illegal, such a custom is clearly extra-legal. The president is elected as a member and is expected to vote. The non-voting custom should be abandoned.

While the president is expected to vote on all matters which come before the board, some restraint is necessary in order to maintain the impartiality demanded of the chair. The president should not attempt to unduly influence the board. For this reason, some board policies require the president to relinquish the chair to a president *pro tem* in order to to make or second a motion. (This should be rare.) The president should not return to the chair until the motion is disposed of.

Because emotions are contagious, the board president should project a positive and enthusiastic attitude at board meetings. Lethargy and indifference also are catching. He must learn to subjugate personal feelings and maintain a consistent attitude — one that provides stability. As presiding officer, the president is a facilitator who not only controls the meeting, but more importantly, creates an environment for decision making. He should not dominate the meeting, but should give every member a reasonable opportunity to speak, debate, or challenge the rulings of the chair. No president should be offended by a challenge and should immediately, in accordance with parliamentary procedure, ask that his ruling be voted on by the entire board. In order to meet these demands, the president must do his homework and be well informed about each agenda item.

Before each meeting, the president should confer with the superintendent to determine potential trouble spots, learn whether any other people will be on the agenda, and review any items which may need additional information.

The president should establish a businesslike tone for the meeting by sticking to the agenda and the time allocation for each item. The meeting should start on time, keep moving, and adjourn at a reasonable hour. Late arriving board members who discover that the meeting has begun will soon catch on. On the other hand, punctual members also catch on if meetings never start until ten minutes after the announced time. This means meetings risk being delayed longer and longer.

Private conversations and digressions among board members should be avoided at the board

Exhibit D—Tips for the Board President

Here are some helpful tips for the school board president. They come from Michael McHamee, president of the school board in Laramie, Wyoming, and were reported in the July, 1980 issue of The American School Board Journal.

- Encourage the superintendent to come to you with any problems he might have. Neither he nor you should wait to address problems until they come up at public meetings.
- Keep other board members informed about special issues and problems, and insist they keep you informed about their concerns.
- Direct everything possible through proper channels, and avoid taking on any matter until you consult your policy covering that issue.
- Know the difference between policy (the board's responsibility) and administrative procedures (your superintendent's responsibility) and help the rest of the board make this distinction during and between meetings.
- Make sure all board members receive adequate background information on agenda items before school board meetings
- Conduct all meetings—both public meetings and executive sessions—using good parliamentary procedure. This can help avoid lawsuits, bad feelings, and misunderstandings.
- Keep meetings moving to prevent board members from becoming sidetracked on an extraneous issue. Give board members and the audience a chance to voice opinions, but keep the statements by both limited to the subject being discussed.
- Know when board members are ready to act on a matter and when they need more time to debate. This knowledcge comes from both experience and instinct.
- When you call for a vote, state the issue you are voting on immediately beforehand to make sure there's no chance of confusion.
- Announce results of all votes. Avoid secret ballots.
- Shield board members, administrators, and teachers from personal attacks at meetings by calling persons attempting to make such attacks out of order.
- Remember board members are the only members of the school community legally empowered to make school policy decisions. Resist attempts from outside groups to usurp that power.
- Discuss as much business as possible in open meetings. Executive sessions should be kept to a minimum.

table. The president must stay in command of the meeting, keep the discussion on the topic, and control the length of individual comments.

When discussion on an agenda item exceeds the time allocated, the president should consider postponing a decision until after further study.

The school board should have written policies and procedures for conducting board meetings, and they should be strictly followed by the board president. Policies and procedures pertaining to school board meetings should be reviewed annually, and desired changes should be made at that time.

See Appendix F for some insights into differences in "presidential style."

Selecting a president

There are various ideas about who should be president and how frequently re-appointed. Some boards regularly rotate this position among the membership. Other boards expect the most senior or longest serving member to assume the position. Still other boards have been led by a particular member for so long that it apparently doesn't occur to them that someone else should assume the position. Year after year they automatically return the same person to the presidency.

Quality of leadership should be the determining factor in deciding how long a person should continue to serve as the board's president. There should be no assurance or divine right that any individual will be elected or re-elected. Neither should tenure automatically be for one term if a person is providing satisfactory leadership. A. school board that has a good president should keep him as long as he is willing to serve. School boards should not play "musical chairs" with the board presidency. The practice of taking turns or using longevity to determine the board's presi dency is a sad commentary on the board's respect for leadership. The presidency should not be a "popularity contest."

Some writers are of the opinion that the presidency should not be in the hands of one member too long. They argue that it is in the best interest of the board, the public, and the school district to have a change in leadership on a fairly regular basis.

Among the characteristics to look for in a good president:

1) The president typically speaks for the board and should be able to subordinate his personal views and represent those of the collective board.

2) The president must be adept at communicating with the news media. Because the majority of the public does not attend school board meetings, most people rely on news media coverage of school board meetings for their information. The extent and quality of that coverage can be greatly improved by the president who properly, openly, candidly, and honestly deals with the media.

3) The president must be a person who avoids playing one member or group against another. At times it may be tempting to do so to pursue a particular goal. On certain issues where there is a divided board and strong feelings, it is difficult to rise above these differences and reach a majority conclusion.

4) The president must be a leader, but not so far ahead of the other board members or constituents as to appear to abandon them or their interests. The president personifies the board. If he is good, the board will be viewed as good. If the president is weak or ineffective, the public will view the board in that light.

The board member's responsibilities

The major responsibility of each board member is to be prepared. This means studying the agenda and supporting documents. Any questions or need for more information should be referred to the superintendent before the meeting. (There should be no surprises at the board meeting!) If a board member has received a complaint or is dissatisfied with the agenda, he should call the superintendent prior to the meeting and try to resolve the problem. A board member who is not thoroughly prepared may be embarrassed at the meeting and cause needless delay in reaching decisions on agenda items.

The board should devote most of its time to major issues and policy discussion and strictly avoid conversation, discussion, or debate with members of the audience; members should not "play" to the audience. A school board member does not represent a particular area, interest or group. Each member must work for the welfare of all the children in the district and base decisions on what is best for the total community rather than a particular area, vested interest group, or organization.

School board members sometimes demand information before voting on a tough issue—or more time to study the matter. Board members, of course, must feel reasonably comfortable with their votes. Sometimes this means trusting the judgment of the superintendent or other staff expert. Sometimes it means delaying a decision for further research. And sometimes it means recognizing that a decision must be made quickly without all the desirable facts on hand.

When a board member refuses to vote without further information, other members of the board will listen closely to determine which reason best explains the abstention:

- The abstaining member disagrees with majority sentiment and wants to block a decision, or
- The member failed to adequately study the information already provided, or
- It truly is advisable to postpone the decision pending further research or study.

It's true that school boards often "fly by the seats of their pants," making decisions without adequate information. More boards probably should emphasize their needs for staff research—but this will involve additional work and perhaps additional staff.

Some other important responsibilities for the individual board member include:

- Keep an open mind in board deliberations; be prepared to compromise where possible to reach a decision the entire board can support;
- Respect the confidentiality of privileged information that is made available in closed meetings or in written material from the superintendent; leaking information to favored friends violates the trust of both the board and the individuals whose reputations might be harmed;
- Don't be afraid to ask questions when you don't understand or to ask "why?" when you don't know the reason for something.

For more insights into the responsibilities the individual board member see **Appendix A.**

The superintendent's responsibilities

Before the board meeting, the superintendent should meet with the board president to review the agenda, clarify any points of concern, and provide a list of people who have asked permission to address the board and the subjects of their interests.

Also prior to the meeting, the superintendent should meet with the top administrative staff. At this time the completed agenda is distributed and plans made for staff participation in presenting items.

During the board meeting the superintendent's involvement will depend on the nature of the agenda items and the expectations of the board. His role must be clearly spelled out in the board policies and procedures manual. The superintendent should not dominate board meetings, of course. His chief roles are to coordinate the preparation of the agenda and carry out decisions made at the board meeting.

The superintendent should not be expected to repeat orally at length what he has already written and mailed in advance. However, he can clarify complicated matters to the public, as well as the board. Other staff members should speak at meetings only at the request of the superintendent. (If the superintendent is to be held accountable, board communications with the staff must be through the superintendent.) However, wise superintendents "share the glory" with appropriate staff members by involving them in presentations at board meetings.

During the meeting the superintendent should write notes about action taken by the board which will require his attention. The next morning he will then be ready to initiate action.

The school board attorney

Few school boards are able to function without ready access to legal counsel. The job of the school administrator, too, is fraught with a growing number of legal pitfalls.

Most boards, however, find they do not need an attorney in attendance at all meetings (although some do). Rather, matters needing legal study are referred to counsel through the superintendent, or the attorney is asked to be on hand whenever a particular matter makes it advisable. In any event, each school board should have a policy that sets forth how it will fill its needs for legal assistance. Board members need to know how they will select and work with an attorney.

Working with the attorney—A school board attorney should have extensive background in school law and be able to work easily with the superintendent.

Attorneys typically advise administrators and school boards in areas of student and teacher rights, implications of court decisions and interpretations of statutory, administrative and constitutional law. They also represent the school district at due process hearings and at hearings before the State Board of Education and other governmental bodies.

Should your attorney attend every board meeting? That's probably not necessary, unless the district is extremely large or involved in an unusual situation. However, the attorney should be kept informed of school problems. Crises often can be avoided by regular communication with the attorney; his advice may steer the board of administration away from an unwise course of action.

The Taylorville, Illinois, Board Policy Handbook contains the following policy on the school attorney:

> "The Board shall retain an attorney for legal counsel and service in the affairs of the district. He serves at the pleasure of the Board and is compensated at an annual retainer fee that is determined by the Board. He will be required to attend such Board meetings or other committee meetings when his services may be needed. His services shall also be available to the superintendent on matters related to school business."

The following board policy statement concerning the duties of legal counsel is found in the Springfield, Illinois, Board of Education policy manual:

> "Legal counsel for the Board of Education shall attend all meetings of said Board as from time to time required. Upon request, legal counsel shall render legal advice and opinions to the Board of Education, to any member of said Board, and to the Superintendent of Schools. All advice and opinions shall be on legal and educational matters pertaining to the district, its administration, business, and affairs.
>
> "Legal counsel, or his designee, shall represent the Board of Education and be in charge of all litigation and legal matters affecting the district. He shall approve all contracts and agreements to be entered into by or on behalf of the Board of Education and shall perform such other duties as may be referred to him from time to time by the Board of Education or the Superintendent of Schools or his designee."

Obviously, different school districts establish different relationships with their attorney. **Sample Policy Nine** presents some of the options. Here are some of the choices each board must make:

- **Compensation**—Some boards pay retainer fees at regular intervals for specified services, plus additional charges for extra services (such as representation in a law suit). Other boards pay for each service separately, either at an hourly rate or an agreed upon case-by-case fee. Perhaps the major consideration is that the attorney be readily available when the superintendent needs legal counsel regarding an administrative decision or when the board requests a legal opinion.
- **Requests for service**—It is essential for board members, administrators, and the attorney to know who is authorized to make use of the attorney's time. Some school boards channel all communications to the attorney through the superintendent. A principal who needs legal advice on student records, for example, goes to the superintendent. The same applies to the school board. Under such an arrangement, most attorneys will not advise individual members of the board or staff. Where compensation is on an hourly basis, some form of prior authorization by the board is essential to assure the attorney that he will be paid—either a blanket policy or a resolution authorizing someone to consult the attorney and obligating the board to pay for the service.

Some boards, by policy or resolution, also authorize the attorney to counsel the president of the board. Such an arrangement is not usually necessary where the board and superintendent have a good working relationship. As chief executive officer, the superintendent should be kept aware of any legal problems confronting the board or staff.

Selecting an attorney—In some school systems, the attorney is appointed annually; in others the attorney simply serves "at the pleasure of the board," meaning there is no contractual commitment and the attorney can resign or be replaced at any time.

The choice of a competent school attorney, of course, is of utmost importance. Here are some guidelines developed by the Whitewater, Wisconsin, School Board, as reported by the Wisconsin Association of School Boards in *Wisconsin School News:*

Sample Policy Nine—The School Attorney

An attorney shall be selected annually by the Board of Education to serve as the legal advisor to the Board and the Superintendent. The school attorney shall be employed on a retainer to be determined in advance.

The attorney shall:

1. When requested by the Superintendent or Board President, serve as counselor to the Board at regular meetings and special meetings.
2. At the request of the Board, represent the district in litigation to which the Board may be a party or in which it may have an interest.
3. Render a written opinion on any legal question when requested by the Superintendent or Board President.
4. Approve, prepare, or supervise the preparation of all legal papers and instruments executed by the officers of the Board, and perform such other legal duties as the Board may request.
5. Be available for phone consultation as requested by the Superintendent or Board President.

The Board shall retain the right to consult or employ other attorneys on matters of special concern, or to terminate an attorney on retainer with an appropriate adjustment in the retainer fee.

1) Appoint a subcommittee consisting of the superintendent and several board members to develop and implement a set of procedures.

2) Contact all law firms in the district's area to determine their interest in being considered.

3) Send out a survey questionnaire to all those indicating interest (see below).

4) Interview those firms returning the completed questionnaire.

5) Recommend to the full board the names of the two or three law firms which should be considered further, and invite those firms to meet with the full board.

6) The full board decides on the firm it wishes to retain and so notifies the firm.

The school board's questionnaire could include the following headings:

1) Resume of firm

2) What preparation and experience has your firm had in the following areas:

- School district organization?
- School district meetings and elections?
- School district building programs (contracts, bonding, etc.)?
- Public employee bargaining (mediation, factfinding, impasse)?
- Negotiating for management?
- Litigation and lawsuits against school district personnel?
- Teacher dismissal suits?
- Students' rights, rules, and regulations?

NOTE: A school board may find it advisable to use two or more firms for different areas of the law. The firm preferred for union bargaining may not be the firm preferred for construction programs.

3) What agreement with the school district would your firm suggest as to retainer fee and other costs?

4) Availability. How does your firm feel about availability to the school board president, board members, superintendent, school administrators? Can you suggest a structure as to how you would prefer to work with the above? Would you be available for school board meetings?

Application of this method will enable a school board to select an attorney based on indications of interest by law firms in the area, adequate information about each firm, interviews with the finalists, and discussion and vote by the full board, laying a firm groundwork for a good long-range relationship between board and legal counsel.

6. RECORDING THE MEETING

The purpose of minutes

A school board can transact business or take official action only by majority vote at a legal meeting. When the meeting is over, what assurance does the board have that its votes will actually set official actions in motion? The answer: The minutes of the meeting.

An important concept for board members to keep in mind is this: "The school board speaks only through its official minutes. If it isn't in the minutes, the school board didn't do it."

Through its minutes, for example, the school board directs its treasurer to pay the bills and tells the county clerk how much to levy in taxes.

Minutes of school board meetings, therefore, represent a good deal more than an historical record of who said what. They represent the only evidence that a board performed its lawful duties and did so in the manner prescribed by law.

Because board minutes have the status of legal documents, it is essential that they be accurate and complete. *The School Code of Illinois* directs that the secretary or clerk of the board keep a record of all official acts in a punctual, orderly, and reliable manner. **See Sample Policy Ten.**

Courts look to the minutes in deciding disputes. Important actions of the school boards, such as the expulsion of a student or the dismissal of an employee, call for the guidance of an attorney. It follows that the record of such actions—including the working of any motions or resolutions—should be prepared with legal counsel.

The recording secretary

The taking, transcribing and filing of school board minutes should be the responsibility of a competent recording secretary. This may be the superintendent's secretary or someone assigned directly to the board. The secretary should record every motion that is made, the person seconding the motion, and should be able to repeat the motion accurately. A draft of the minutes should be made as soon after the meeting as possible. As the board's chief executive officer, the superintendent should review the draft before the final copy is typed. The board secretary should do the same.

The secretary recording the minutes must be located in a position where it is easy to both see and hear the board members and the superintendent. If the same secretary records the minutes and prepares the agenda items, there can be no problem about the secretary being informed and knowledgeable about the agenda.

Tape recording

The tape recorder is a regular fixture at many board meetings. The value of a complete recording of the board meetings seems to be directly related to the extent of controversy and conflict in the

Sample Policy Ten—
Board Meeting Minutes

The Secretary shall keep in a punctual, orderly, and reliable manner a record of the official acts of the Board, which shall be signed by the President and the Secretary.

The minutes shall record all motions, showing the member making the motion, the second, and the result of the voting. On all matters requiring a roll call vote, the yeas and the nays shall be recorded.

The minutes of the preceding meeting, with any changes made by a motion properly made and carried, or as directed by the President without objection, shall be approved by the Board.

The official minutes shall be in the custody of the Secretary. They shall be available to citizens for inspection during regular office hours in the office of the Superintendent, in the presence of a school district official or employee who has designated responsibility for school district records. The official record shall not be removed from the Superintendent's office except by vote of the Board.

meetings. Playbacks can be useful when a board member wants to hear precisely what was said during a discussion. Sometimes it is necessary to clear up misunderstandings or misimpressions. Tape recordings also can be helpful in the preparation of minutes.

Recording the minutes

The School Code requires that an official set of minutes be kept to record all transactions of the school board. The *Open Meetings Act* lists a number of items that must be included in the minutes (discussed later). Neither law specifies the detail in which the minutes must be kept. Therefore, practices vary among Illinois school boards. Some boards keep minutes that are probably too detailed (often quoting the comments of individual board members), while others may not record enough information.

Board meeting minutes should be as brief as possible, but must provide a clear and accurate record of each board action. Lengthy discussions may be briefly summarized, but motions and resolutions must be carefully worded and appear in the record exactly as the board acted upon them.

Documents that the board acts upon—such as budgets, written plans, lengthy resolutions, and the like—need not be repeated in the minutes. They should be incorporated in the minutes by reference to a clearly distinguishing title and/or indexing number. Then the related document must be kept on file in order to make the record of the board's action complete. The minutes need to properly identify the document and where it is filed.

All the board's resolutions, awards of contracts, approval of executive actions, and other actions should be numbered consecutively in chronological order of occurrence. Marginal notations or brief subject titles can be used to indicate the location of the more important items. They will be useful in searching for specific actions.

The stenographic notes from which the minutes are prepared should be preserved for a limited time. A year of two should be sufficient.

Disposition of a motion

The minutes should record the manner of disposing of each motion before another motion is made and recorded. This does not apply to subsidary motions pertaining to the motion before the board, such as motions to amend, substitute, or table. Any unrelated motion is out of order when a motion is before the board. If the presiding officer does not remember that a motion is before the board, it is the duty of the secretary or other member to remind him that such is the case.

The words "Passed" or "Carried" following the statement of a motion in the minutes are not sufficient, except for a motion to adjourn or motions considered to be of minor importance. On important business motions, the notation should be "Carried unanimously, " if such is the case. If the vote is divided and there is a poll of the members, the votes of the several members should be recorded.

Each separate action should be recorded in the minutes in one or more separate paragraphs.

What minutes should include

The *Open Meetings Act* requires that minutes of open or closed meetings must include:

1) The date, time, and place of the meeting;

2) The members recorded as either present or absent;

3) A general description of all matters proposed, discussed or decided, and a record of any votes taken.

The minutes of each school board meeting also should include the following:

1) Clearly identify the school board by district name, number, and county.

2) A statement that a meeting was called to order, by whom, the hour, and whether the meeting was a regular, organization, reconvened, or special meeting. If it is a special meeting, a copy of the official notice and agenda should be incorporated directly or by reference.

3) Following the listing of members as present and absent, there should be a statement that the president declared a quorum present.

4) Statement of action taken for approval of the minutes of the last regular and any special or other meetings that have been held since the last regular meeting.

In addition, most board meeting minutes will include some or all of the following:

1) Notation of any board members who arrive late or leave early, including a record of the time.

2) Notation of presentations from delegates or visitors who have oral communications or petitions to present, along with a record of any actions by the board referring such matters to committees or to the superintendent for study.

3) Statement of written communications and petitions read, such as those from churches, service clubs, parent-teacher groups, teacher organizations, pupil groups, or individuals, and a record of any subsequent action. Each document should be dated.

4) Record of hearings and actions on reports by committees and members of the board.

5) Record of hearings and actions on previously requested reports from administrative officers, such as the business manager, the architect, the athletic director, or the school nurse. If written, the

reports may be numbered and filed as documents and reference made to them in the minutes by file and document number.

6) Record of the presentation of—and action on—reports of the superintendent.

7) Record of motions and actions on unfinished business taken from the table by the board.

8) Record of motions and actions on matters of new business.

9) Record of any motion to close the meeting to the public and the times at which the meeting was closed and re-opened. Separate minutes of the closed session must be recorded.

10) Record of the motion to adjourn.

Type of meeting—The minutes should open with a statement as to whether the meeting is a regular, adjourned (reconvened) or special meeting; the time (date and hour) and place of the meeting. If it is an adjourned meeting, the minutes should show the date of the meeting from which the adjournment was taken.

If the minutes pertain to a special meeting, the call or notice of meeting should be included in the minutes by reference or by attaching a copy. This will counter any attack upon the legality of the meeting.

Where it is necessary that a notice of a meeting be posted in compliance with the *Open Meetings Act*, a copy of the notice as posted, together with a certificate or affidavit of the person who posted the notice stating where and when it was posted, should be filed with the minutes.

Monthly statements—Because the board must be kept informed regularly of the current financial status of the school district, a financial statement should be presented each month together with the agenda. The statement should include, but not be limited to, the following information: (1) amount budgeted, (2) amount expended to date, (3) current bills, and (4) unexpended balance for each of the major budgetary funds and extracurricular activity accounts. Although a board action usually is not called for, all finance reports should be incorporated in the minutes, at least by reference.

Current bills—A list of the audited invoices submitted for board approval must be incorporated in the minutes. Where invoices are too numerous to list individually in the minutes, the total amount approved can be recorded with a reference to a separate itemized list. The record must show each itemized amount, to whom paid, for what purpose, and the budgetary item debited.

The minutes also must include a roll call vote in which the names of members present are recorded with their respective votes.

A certified copy of this portion of the minutes, signed by the board president and secretary, authorizes the school treasurer to issue checks in payment of the approved bills.

Current payroll—Any school board action approving payroll disbursements also must be recorded in the minutes, along with a roll call vote. In some districts, there may be votes on itemized amounts; in some districts, there will be a vote on total payroll amount. (See page 34.) The school treasurer will need a certified copy of this portion of the minutes.

Contingent or special business—The school board frequently adopts resolutions in order to set complex transactions in motion. These resolutions must be incorporated in the minutes directly or by reference. It is good practice to introduce each resolution with a formal motion and to record the "yea" or "nay" vote of each member, even though the latter is not always required by law.

Resolutions most often brought before school boards are these:

1) Authorizing the issuance and sale of tax anticipation warrants, interest bearing orders, bonds or other obligations against the district. Such resolutions must be legally sound and may require the advance approval of bond counsel.

2) Authorizing the establishment of revolving funds or the rules governing the handling of class, association, club, or other trust funds.

3) Authorizing "a person or persons designated," usually the superintendent, to prepare a tentative budget for the coming year.

4) Adoption of the annual budget. This action must follow a public hearing, notice of which has been given at least 30 days preceding. Boards of education are required to adopt a budget before the end of the first quarter of the fiscal year to which it applies.

5) Authorizing the certification of the tax levy.

6) Authorizing the acceptance of bids for maintenance, repairs, alterations, or new construction.

7) Authorizing the acceptance of bids for furnishing supplies, equipment, or services (other than those furnished by teachers or regular employees).

8) Ratifying teacher contracts. This is required in the employment of new teachers or where an increase in compensation is being authorized for teachers who hold continuing contracts. In employing teachers, therefore, a roll call vote must be taken and recorded in the minutes.

9) Giving notice of dismissal. When the person involved is tenured, a State Board of Education rule requires that notice of dismissal be served within 48 hours.

10) Granting leaves of absence to administra-

tors or teachers.

11) Submitting a public question to referendum.

12) The adoption of necessary rules, regulations, and policies.

13) Adopting the superintendent's contract.

14) Recording the retirement of employees.

15) Granting permission or adopting a policy for the use of school facilities by outside organizations.

16) Recording all motions. Although not a legal requirement in every case, it is good practice to state who made and who seconded the motion. The record should also state whether the proposition carried or lost.

All routine fiscal matters should be approved for the following fiscal year no later than June. At this meeting, the board also might:

- Direct the secretary to prepare a calendar of meeting dates and places for the ensuing year;
- Appoint the auditor and legal counsel;
- Adopt a resolution naming depositories and authorizing signatures for various school district funds.

These matters, of course, should be recorded in the minutes.

Closed meetings

The minutes of meetings closed to the public must be treated the same as the minutes of meetings open to the public—with two notable exceptions:

1) Meetings can be closed to the public only upon a formal motion and majority vote. The motion must be made at a public meeting and should recite the statutory exception from the *Open Meetings Act* that is being invoked. This motion and the vote must be recorded in the minutes of the open meeting and should be referred to in the minutes of the closed meeting.

2) Minutes of closed meetings are confidential until the school board decides it is no longer necessary to keep them confidential. (See page 46.)

Thus, the minutes of closed meetings must include such routine entries as date, time, place, members present and absent, and a description of topics discussed.

In a paper prepared on this topic, Chicago Attorney Terrence M. Barnicle wrote,". . . it appears that the minimum requirements of the Act can be met by simply indicating that a particular matter was proposed or discussed without indicating the substance of the discussion, individual board members' opinions, staff comments or recommendations, etc.... however, if any matter is decided, then the specific action taken (the motion that was adopted) must be recorded along with the vote."

Where the school board goes into closed meeting to discuss litigation that is "probable or imminent," the minutes of the closed meeting must include an explanation as to why the board believes litigation is probable or imminent.

Where a closed meeting is part of an open meeting, the minutes should show the times at which the open meeting adjourned, the closed meeting convened, the closed meeting adjourned, and the open meeting reconvened. (Some board meetings can be closed in advance by board action and will not be part of an open meeting. The minutes of such meetings should include reference to the earlier action authorizing the closed meeting.)

Initiating a referendum

When an election is called by a board, whether to vote upon building a new school or increasing the tax rate or any other matter which must be submitted to a referendum of the voters, the minutes must show a meeting of the board and its order or resolution calling the special election. The full resolution calling the election must cite the statute that authorizes the referendum and must be incorporated by reference in the minutes of the meeting.

Not less than 61 days before a regular election date, the school board secretary must certify the public question to the election authority (county clerk or election commission). The certification must include: the form of the public question, the date on which the question was initiated, and a certified copy of the board's resolution.

Adjournment to another date

If adjournment is to another date, the time and place of the reconvened meeting must be specified in the minutes. If the board has an agenda, it should be attached to the minutes. No public notice is required if:

- the adjourned meeting reconvenes within 24 hours of the original meeting; or
- the time and place of the reconvened meeting were announced at the original meeting and there is no change in the agenda.

If neither of the two above tests is met, public notice must be given 24 hours in advance of the reconvened meeting. The exact circumstances should be reflected in the minutes. A copy of the public notice, if required, should be certified by the board secretary and incorporated in the minutes.

Other official requirements

Signature of minutes—*The School Code* requires that minutes be signed by the president and secretary or clerk of the board. Where a resolution is included in the minutes by reference only, it is recommended that the resolution, too, be signed by the president and secretary or clerk.

Approval of minutes—Although there is no provision in *The School Code* for this action, it is advisable that the minutes be approved at the next regular meeting of the board, so that any inaccuracies may be corrected promptly. Minutes must accurately reflect what happened. A board cannot amend its previous actions by amending its minutes, although many actions can be rescinded or revised by subsequent actions.

Certification of minutes—The secretary or the clerk, as keeper of the board records, should certify the minutes of meetings as being the lawful record of board actions. Special certification forms should be adopted for this purpose.

Inspection by the treasurer—The records of every school board must be submitted to the school treasurer having custody of the funds of the district for his inspection and approval on the first Monday of April and October, and at such other times as the treasurer may require.

Amendments to minutes

A board may amend its minutes at any time to conform to what in fact occurred at a given meeting. Amendments may be made to the minutes even though the membership of the board has changed and a long period of time has elapsed. However, the board may not amend its minutes so as to change the action taken. It may only change the record of such action in order that the record may correctly reflect what transpired at the meeting.

The Illinois Supreme Court stated in one case that the official record constitutes the only lawful evidence of action taken and cannot be contradicted, added to, or supplemented in court by oral evidence. In another decision, the courts said that although the official minutes of school boards are entitled to great weight, they are not conclusive and must be considered with other portions of the record in order to determine the true facts and happenings.

Courts are reluctant to allow the amendment of minutes by oral evidence, but it may be concluded that minutes may be amended where they are shown to be deficient, and any relevant evidence may be introduced to establish a definitive record.

Indexing of minutes

Because minutes of school board meetings are official records, each school district is responsible for maintaining these records for a number of years. It is important that the school district devise some system for indexing the minutes of its school board meetings. Usually the minutes are filed in a minute book with numbered pages, bound annually, and placed in a convenient location. A chronological index, arranged by meeting dates, is developed each year and bound with the official copy of the minutes for that period.

In addition, a more meaningful, topical or subject index is recommended. The needs of the school system will determine the degree of sophistication required. A subject index can go either on separate pages bound with the minutes or in a card file. In either case, the subjects listed should be in alphabetical order. The card index system has an advantage over the bound pages because a card for each new item can be inserted in its appropriate place without disturbing the alphabetical arrangement of the items. If the index is kept on pages of the minutes book, the insertion of new items may require extensive alterations and the re-typing of the page or of the whole index.

A simpler way to trace subjects back to an appropriate meeting is to put the meeting date on all documents approved or adopted by the board. Just type, print, or stamp "Adopted by the Board of Education (date)" on all policies, resolutions, salary schedules, contracts, and other documents. In other words, the document itself is referenced to the minutes, making a separate index unnecessary.

Distribution of minutes

Minutes of each meeting should be duplicated and distributed to the members of the board with the agenda for the next meeting. In some districts the minutes are distributed to all board members as soon as possible after the meeting. Either practice provides members an opportunity to study the minutes carefully and to retain a copy for their personal files. It also makes it unnecessary to consume meeting time with an actual reading of the minutes. The minutes may be approved as circulated, or corrected and then approved.

The minutes of closed meetings present a different problem. Because of their confidential nature, many boards prefer to avoid distribution, even to members. Others distribute the minutes but collect them at the next meeting.

Minutes of public meetings also are among the official documents that must be made available by subscription to anyone who pays an annual fee covering costs. See Section 10-21.6 of *The School Code.*

The minutes book

The law provides that the school board shall purchase a suitable book for its records, and it is generally understood that the minutes book shall be kept exclusively for this purpose.

The minutes book should be a looseleaf book of convenient size with a heavy, stiff cover. Books and paper filler, 8½ inches by 11 or 14 inches are prepared by supply companies for use by school boards. It is convenient to have pages printed as blank forms to be filled with regular and recurring preliminary data.

The board's official copy of the minutes, signed by the president and secretary as approved, should be kept in a fireproof vault adjoining the board room or the superintendent's office. Documents that belong to or with the minutes should be kept in the same vault. This also applies to old minutes for so long as they may be needed for reference. Even after they are not needed for reference, minutes should be preserved as part of the school district's permanent record.

To save space, old records can be converted to micro-film.

The minutes of closed meetings should be kept in a separate confidential file until the board votes to make them part of the public record (see below).

Minutes are public records

The minutes of school board meetings are public records. As such, the board has an obligation to see that its minutes are retained permanently and that the public is given access to the minutes under reasonable controls.

Board minutes, like other open records, should be made available for inspection at the school board's official place of business during normal office hours. It is essential that inspection be under the supervision of a responsible employee and that none of the official record be removed from the premises.

Some school districts require advance notice (24 hours) from persons wishing to inspect board minutes or other available school records. It is proper to charge an amount sufficient to cover costs where copies are requested.

Open meetings—The minutes of open meetings must be made available for public inspection within seven days after they are approved by the school board, according to the *Open Meetings Act*. However, some boards wisely make unapproved minutes available much earlier than that when requested by a news reporter or other citizen. There is nothing to be gained by delaying access to minutes; in fact, delay can fuel inaccurate rumors. Unapproved minutes should usually be just as accurate as unapproved minutes—if the recording secretary is competent.

Closed meetings—The minutes of closed meetings are confidential until the school board, by majority vote, declares that the reasons for confidentiality are no longer valid. Under a law enacted in 1988, school boards are required to formally review their closed meeting minutes twice each year and declare which ones must remain confidential and which ones must go into public record. To comply, each school board should establish regular meetings (at six month intervals) for reviewing the confidential nature of its closed meeting minutes.

The minutes of some closed meetings should be made public rather quickly. For example, the minutes of a meeting closed to discuss the purchase of real estate should be made part of the public record once the transaction is completed. On the other hand, the minutes involving a student expulsion would probably remain permanently confidential unless subpoenaed by a court of law.

School Board Records and the Freedom of Information Act

Under the Illinois Freedom of Information Act, enacted in 1984, governmental bodies are required to make public records available for inspection and copying within seven working days of a request.

Because some types of confidential records are exempt from the public access requirement, it sometimes takes seven days or more to determine which portions of requested records may be made available. (The law provides a procedure for extending the seven days to 14 days.) Under the law, school districts may process virtually all requests for records under procedures of the Freedom of Information Act.

IASB recommends, however, that school boards use more informal procedures where a request for records (a) is informal, and (b) clearly involves material that is not exempt from public inspection.

Requests for information placed under the FOIA require documentation of the school district's response — a kind of "paper trail" to show when the request was received and how it was handled. No such documentation should be necessary for informal requests for records that can readily be made available.

Records that should be made available on an informal basis include:

- Minutes of open meetings.
- Copies of adopted resolutions, except those that may be confidential (such as notices of employee dismissal).
- Budget documents.
- School board policies (which are required to be available for public inspection, anyway, in order to be enforceable).

School officials should usually be able to grant public access to these records with little or no advance notice. Such a procedure is good public relations and it reduces paperwork.

Note, however, that any request submitted in writing should probably be treated as an FOIA request.

7. MAKING AND MONITORING SCHOOL BOARD DECISIONS

Much of what goes on in a school district is governed by state law, federal law, court decisions, and state regulations—not to mention financial constraints and local tradition.

The fact remains, however, that the school board is a decision-making body. Some boards make big decisions governing the overall mission of the district. Some make small decisions governing administrative trivia. Some make both kinds.

Three types of decisions

Although the typical school board appears to make many different kinds of decisions, all of those decisions can be put into three general categories:

- Policy decisions
- Problem-solving decisions
- Ministerial decisions

Policy decisions—Policy decisions express the school board's intentions. They provide continuing guidance in making future decisions.

A board policy is roughly equivalent to a municipal ordinance in terms of its legal force. Good policies are usually less precise than ordinances, however, so that the professional staff will have some leeway in making day-to-day decisions.

In making discretionary decisions in the day-to-day management of the district, the superintendent is guided by policies of the school board. The discretionary power delegated by the school board to the superintendent does not amount to a license. He is typically required to report periodically on what he has done and to assess the effectiveness of his actions. The basic principles embodied in the school board's policies chart a course of action for the superintendent. These policies reflect the values and wishes of the community as well as state law.

Without board policies, the superintendent and other staff can only guess at the wishes of the board and community. Therefore, the development and adoption by the board of an official board policy manual is essential. This document must state clearly and positively what the board wants accomplished in such areas as:

- Curriculum and instruction
- Budget, finance, and business management
- Staff development
- Personnel/labor relations
- School board procedures
- Community relations
- Support services

It's important that policies be in writing and easily accessible for the day-to-day guidance of the superintendent and staff, students, parents, and the board itself.

Illinois law requires that school board policies and administrative rules be available for public inspection.

Problem solving decisions—Problem solving decisions come in response to a crisis or opportunity that cannot be properly resolved by the superintendent. For example, in the face of declining enrollment, the typical school board would not expect its superintendent to make a final decision on which building to close. Although the superintendent would be expected to provide information and to make recommendations, the school board should make the final decision and would probably deliberate the alternatives at length.

The problem-solving decision usually has an isolated, one-time impact. But not always. Such decisions can establish precedents that have the force of policy. For example, a school board's decision to grant a benefit to one employee may obligate it to grant it to another in a similar situation.

Ministerial decisions—Ministerial decisions required of the school board are set forth in the statutes—most notably in Article 10 of *The School Code*. For example, a school board is required to:

- Appoint teachers and fix their salaries
- Provide notice of its meetings
- Direct what textbooks shall be used

- Pay all bills
- Publish an annual financial report

With few exceptions, ministerial duties such as these are delegated to the superintendent—although the school board is required by law to take official action on the final decision. Most boards, for example, hold the administration responsible for selecting new teachers in accordance with the board's personnel policies. But the boards themselves must take official action entering into contracts with new teachers.

Which decisions are best?—The law does not permit school boards to avoid taking action on many ministerial duties. Where there is a good relationship between the board and administration, combined with sound procedures for administrative reporting and board action, these routine duties will consume only a small amount of time at board meetings.

Real room for improvement exists, however, in the distinction between policy decisions and problem-solving decisions. School boards that emphasize policy development are required to make fewer problem-solving decisions—especially decisions in response to routine problems. Such boards find they can accomplish their aims most efficiently by delegating authority—through their policies—to the superintendent. The superintendent is then able to resolve a wider array of problems without bringing them to the board for action.

Conversely, boards that have few if any written policies find their meetings running late into the night. Because the superintendent lacks the guidance of board policy, he must bring numerous problems to the board for discussion and action. The board then finds itself making the same decision over and over again, often with inconsistent results.

The decision-making process

Majority rule—School boards reach decisions in several ways. "Majority rule," of course, is the bedrock of representative government and parliamentary procedure. Moreover, it is easy. Following a motion, a second, and discussion, the board president calls for a vote. Then it's just a matter of simple arithmetic.

Majority rule, however, can create problems. For one thing, simple arithmetic can be misleading. A unanimous vote, for example, makes it appear that the school board is 100 percent in favor of the motion. Yet, each of the seven voting members may have had substantial misgivings. Each board member goes through a mental process of weighing the pro's and con's. The typical member may have decided to support the motion because the pro's outweighed the con's by a slim margin.

The final tally—whether it's 7-0 or 4-3—looks easy to the casual observer. This easy appearance can be a disservice to the board when the issue is controversial. A "yea" or "nay" vote by itself can give the impression that board members didn't consider all sides of the issue. The result: charges from disgruntled citizens that the board is unresponsive—especially when the vote is reported like the score of a ballgame (7-0, 6-1, 4-3).

One way around this difficult situation is for each member to explain the reasons for his vote on sensitive issues. Another is for the president to summarize the pro's and con's brought out in the discussion in an effort to describe the collective feelings of the board.

Majority rule has another disadvantage. It produces losers as well as winners. That is democracy in action, of course, and should not be harmful. The problem is that the position of the winners may not really be much better than the position of the losers—and the best position of all may be somewhere between the two extremes.

Seven heads are almost always better than one and sometimes better than four, five, or six. That is why "consensus decision making" is gaining favor among many small groups.

Reaching consensus—Making a decision by reaching a common ground among seven people usually takes longer than counting a show of

3+2=
7+8=
FIRE
TORNADO
STORM
BOILS
GNATS
FROGS
LOCUSTS
HAIL
WATER TURNS TO BLOOD
EXIT

We've gone all-out on Life Safety

hands. However, it may be faster than the debate that divides a board into bitter factions. Consensus decision making builds group cohesion and minimizes the risk of one or two members sabotaging the decision, because all members help shape the decision.

A consensus is reached when every member can agree to support the decision—even though the decision may not have been anyone's first choice. Members with differeing views discuss the issue until they reach a common ground.

In making decisions by consensus, it is essential that all members of the board:

- Have ample information and time to study it.
- Candidly share their views and listen to the views of others.
- Attempt to find a decision that all members can suport—not just a simple majority.
- Agree to support the final decision.

The role of administration

Planning, implementing, and evaluating decisions made at board meetings typically involves the superintendent and his administrative team at each step.

Administrative recommendations—When the agenda is planned, the superintendent should make a recommendation or take a position on most action items. During the board meeting, members of the board discuss and vote on these recommendations. In general, boards tend to approve the recommendations made by their superintendents—assuming that the superintendent has adequately researched the issue and weighed the alternatives against the goals and standards of the board.

On the other hand, if the board modifies or rejects the superintendent's recommendation, the superintendent remains obligated to support and implement the board's decision.

Following the meeting, the superintendent is held responsible for seeing that board decisions are carried out and is delegated the authority necessary for doing so. Some decisions will require immediate implementation, others can be delayed. Typically there is a time lag between legislative action and implementation. Variables to be considered by the superintendent include: the size of the administrative staff, the board's priorities, the need for a timetable, and the scope of the assignment. If the superintendent has an adequate administrative staff, much of the work can be delegated. In a small school district, the superintendent probably will do most of the work and will need to establish priorities. A timetable that lists tasks, dates started, and dates to be completed is useful. Deadlines must be realistic. Tasks which require several months to complete need to be carefully scheduled and monitored. In future meetings, the superintendent can make progress reports to the board on how its decisions are being implemented.

Monitoring administrative performance—The school board relies heavily upon the superintendent for leadership and action. The board is the "governing" body and the superintendent is the "manager" of the enterprise. This means the board must place a good deal of faith in the superintendent—but it need not be blind faith. A school board must be satisfied that the superintendent is managing the district within board policies.

According to the authors of *Planned Appraisal of the Superintendent*(IASB, 1978), there are some questions that each board must resolve for itself. For example:

1) Is our board making the decisions that it ought to be making, or is it bogged down with administrative decisions? Is the superintendent making policy decisions?

2) Does the board receive effective leadership from the superintendent in the form of information, advice, and recommendations on board actions?

2) Do the board and superintendent understand and support one another. Is there mutual trust and respect?

4) What kinds of problems are coming to the board? Would they be more readily solved by adequate policies and planning?

5) Is the board adequately informed about the district's problems, progress, accomplishments, and needs? Do board members and the superintendent agree on what the schools are supposed to accomplish?

6) Do board members feel comfortable with the programs and operations of the school district? Are they comfortable with the work of the superintendent? Is the feeling based on fact, informed opinion, or blind faith?

A board that does not have satisfactory answers to the above six questions, probably should consider installing a planned appraisal system. An effective appraisal system benefits the board and the superintendent because it forces them to sit down together and spell out their respective responsibilities and to agree on how the performance of those responsibilities will be evaluated.

8. DEALING WITH THE PUBLIC

Although every citizen is entitled by law to attend school board meetings, only members of the board are entitled by law to take part in deliberations. The meeting is the only means by which a school board carries out its duties and conducts official business. The public attends to listen and observe.

Section 10-16 of *The School Code* also states:

> At each regular and special meeting which is open to the public, members of the public and employees of the district shall be afforded time, subject to reasonable constraints, to comment or to ask questions of the board.

Wise school boards recognize that their meetings provide ideal opportunities for communicating with parents, community leaders, organizations, and other citizens. (See "Planning interesting meetings" on page 27. Also see **Appendix D.**) While no person or group need be allowed to interrupt board deliberations, it is important to give everyone an opportunity to be heard in an orderly fashion.

The public at board meetings

Procedures for hearing citizens—Every school board should adopt policies and procedures for hearing citizens in a manner that does not obstruct the conduct of business. The board policy manual should include a section on citizen involvement at board meetings. Depending upon the number of people who typically attend meetings and ask to address the board, citizen involvement may be loose and informal or strictly regulated. The options presented in **Sample Policies Eleven** and **Twelve** illustrate the range of possibilities available for differing circumstances.

The extent of restrictions on citizen participation may vary from meeting to meeting. Some boards schedule an extra meeting each month just to discuss critical issues and to get public comments. Procedures for citizen participation at such a meeting can be less restrictive than those necessary for a regular business meeting. The aim, of course, is always to get work accomplished—and to keep democracy from becoming anarchy. As a practical matter, the degree of regulation called for is a function of numbers and emotions—how many people wish to address the board and how controversial is the topic.

Regardless of what the policy says, effective public participation frequently depends upon the ability of the presiding officer. The president must have the authority to (a) require speakers to identify themselves, (b) enforce time limits, and (c) rule inappropriate comments out of order (such as personal attacks on individual students, employees, or other citizens).

Citizens who attend a meeting in order to address the board should not be forced to sit through the entire meeting. (What started out as a mild inquiry can become wild hostility after a couple of hours on a hard chair.) Public participation should be early on the agenda.

All members of the board should be fully attentive when a citizen is addressing the board and should feel free to ask questions for clarification. Moreover, if a citizen's question or concern can be resolved by the president or superintendent immediately, then it should be.

More often than not, however, issues raised by citizens at board meetings call for subsequent follow-up and response at a later time. The board member who responds prematurely, before the

Sample Policy Eleven— Public Participation

The Board of Education welcomes attendance by members of the public at its meetings.

The Board shall conduct the business of the District in an orderly and efficient manner, and will, therefore, require reasonable controls to regulate public presentations to the Board. At an appropriate time, the President may invite comments by visitors.

The President is responsible for the orderly conduct of the meeting and shall rule on such matters as the time to be allowed for public discussion and the appropriateness of the remarks to the subject under consideration.

board or staff has an opportunity to study and discuss the matter, usually regrets it. Rather than make a promise that might have to be broken, the president should simply assure the speaker that the matter will be fully examined and an appropriate response made as promptly as possible.

Welcoming visitors—A cordial atmosphere is in the best interests of everyone. Business goes most smoothly when board members and visitors feel comfortable with one another.

Citizens who attend board meetings—unless they do so regularly—are likely to feel some uneasiness. The board and administration can intensify that uneasiness by ignoring the visitor. They can convert the uneasiness to hostility by seeming to question the visitor's right to be there. Or they can dissolve the tension with a cordial welcome.

Wise boards and administrators treat all visitors with courtesy and respect, welcoming them to board meetings as thoughtfully as they would to their own homes. A large turnout can make it impossible for someone to welcome each citizen individually, but the effort should be made with early arrivers at least, and the board president can open the meetiung with a brief statement welcoming the audience.

It is also a common courtesy to provide each member of the audience with a copy of the printed agenda, as well as any background materials that will help the visitor understand what the board is doing.

A number of school boards prepare a printed pamphlet for visitors at board meetings. While the pamphlet does not prevent controversial issues from arising at board meetings, it can help keep board meeting procedures themselves from becoming the center of controversy. An effective pamphlet makes it clear that the board acts, not arbitrarily or capriciously, but in accord with fair and sensible rules. Such pamphlets typically explain the rights and responsibilities of citizens, including the board's rules for citizen participation in meetings; how the board handles "new business," and steps the board follows in developing or revising its policies.

Contents also can include the address and telephone number of the board office, pictures of board members, general information about board meetings, and an explanation of the board's powers and duties. The pamphlet also should encourage citizen interest in the schools.

It is part of the board's responsibility to help educate people about how it conducts business for the citizens and children of the district. In addition to giving first-time guests an understanding of board operations, a school board pamphlet can encourage confidence in the board as an elected body and help people understand how and when their concerns may receive attention.

Sample Policy Twelve—
Public Participation

The Board of Education welcomes attendance by members of the public at its meetings. It also wishes to encourage the expression of opinion on matters under consideration by the Board.

The Board shall conduct the business of the District in an orderly and efficient manner, and will, therefore, require reasonable controls to regulate public presentations to the Board.

Notification by a visitor to address the Board shall be submitted in writing to the Superintendent seventy-two (72) hours prior to the meeting.

Comments by visitors will be made during the section of the meeting designated for recognition of visitors. Each speaker shall be limited to a five (5) minute presentation. The person wishing to be heard by the Board shall first be recognized by the President. He shall then identify himself and proceed with his comments as briefly as the subject permits.

The President is responsible for the orderly conduct of the meeting and shall rule on such matters as the time to be allowed for public discussion and the appropriateness of the remarks to the subject under consideration.

Plenty of extra copies of the pamphlet should be made available to visitors at each meeting. Additional copies can be distributed throughout the community.

Petitions and delegations—Citizens who feel strongly on specific issues may choose to present the school board with their views buttressed with the supporting signature of other citizens. In general, a school board should accommodate group petitions in the same fashion as it hears individual citizens. A summary of points to keep in mind:

1) Delegations grow up around sensitive issues and sometime express themselves in harsh words. Special tact is essential.

2) Rather than let itself be stampeded into a quick action it may later regret, the board should stick to its established procedure for putting the matter on the agenda for study and future deliberation and action.

3) A group petition does not necessarily represent the community's prevailing view. (If necessary, this can be determined through community surveys or public hearings.) However, a petition may represent a minority view that is legitimate

and fully deserving of school board accomodation. Moreover, a minority view can soon become a popular cause if it is treated callously.

4) Whatever action the board ultimately decides to take, the petitioners are entitled to a full explanation of the reasons.

Closed meetings and the public

Closed meetings create public relations problems for governing bodies of all kinds, even where the meeting is in full conformity with the law. Most common problems occur when:

- The board goes into closed session during a public meeting and leaves people waiting interminably for the public meeting to reconvene.
- The board goes into closed session by asking the audience to leave the room, even if it means standing in the hall or outside in the rain.
- The board goes into closed session at the end of a long public meeting, then reconvenes to take formal action after everyone else has gone home.
- The board makes excessive use of closed meetings, creating the impression that it's hiding from the public.

Avoiding these obvious affronts to the news media and public is not always easy, but here are some suggestions:

- Hold a closed meeting at the end of a regular public meeting when the board expects to take no formal action as a result. This permits the public meeting to proceed without interruption.
- When a closed meeting must be held during—or at the beginning of—a public meeting, move the board to another room and let the audience remain in the regular meeting room. (This won't apply, of course, where no one attends board meetings.)
- Where a closed meeting will lead to an immediate vote on a sensitive issue, consider holding the session before the scheduled time of the public meeting. Note, however, that this procedure calls for special notice both to board members and the public to announce the earlier time.

To keep closed meetings in conformity with the law while avoiding serious public relations problems, remember that a board can close a meeting only upon formal motion and vote at a public meeting. The president should explain both the legal basis and practical necessity for closing the meeting.

Handling complaints and criticisms

The typical school board member wants to do what is right and live in harmony with the rest of the community. However, many citizens hold the board of education responsible not only for its own acts, but for the acts of all the employees and students who represent the district.

How school officials respond to complaints and criticisms has a profound impact on the conduct of school board meetings—not to mention the peace of mind of individual board members. In some districts, school board members rarely hear complaints, and even more rarely are they asked to intervene. Board meetings are notable in such districts for the absence of controversy.

In other districts, a meeting of the school board represents a regular forum for airing gripes of all sorts against the schools. Board members are constantly beleagured with calls from unhappy constituents.

Some of the difference, of course, can be explained by differences among communities. For example, urban and suburban communities tend to generate more dissent and more political activism than small, rural communities. But not always. Levels of criticism vary with the issues facing any given school board. Closing a school can become an explosive issue in even the most passive of rural communities.

Fortunately, there are some things that boards can do to reduce the severity of criticism, and in many cases, reverse its effects.

Research shows that the most supportive constituent is not one who has never complained, but one who has had a complaint handled in a fair, constructive manner. By the same token, complaints that have been ignored and allowed to fester have been known to grow and drive school board members from office. It behooves every board, therefore, to establish official procedures for handling complaints and criticisms. Such procedures serve the best interests of both the school district and the citizen who needs to deal with the district.

There are variations in the ways that different school boards and school administrations deal with complaints and criticisms. Based on local custom, such variations are probably all effective in meeting local needs. However, effective procedures for dealing with complaints and criticisms all have certain principles in common.

The attitudes of school officials—Experienced board members and administrators know there are some people who just like to complain and others who have their own personal or political reasons for attacking the school system. They also know, however, that complaints also frequently arise out of (a) genuine differences of opinion or (b) a failure of the school system to communicate accurate information.

An effective attitude or posture for school officials is one that treats all complaints as legitimate, provides an open mind, and makes no promises that can't be kept. Where a complaint stems from a misunderstanding, the solution is usually to provide accurate information. Where the complaint stems from different values or beliefs, the solution involves negotiation and mutual understanding—recognizing that people don't readily change their values or beliefs and the best one can hope for is that the parties will agree to disagree.

Avoiding complaints—Although the schools touch many people in sensitive areas of their lives, some complaints are produced needlessly by the school establishment itself. Most notable failures occur when:

1) The school board, by its policies and its actions, does not emphasize to all employees the vital importance of human relationships, especially relationships with parents;

2) People who are directly affected by a decision to change bus routes, close a school, or drop a program are not given an opportunity to speak up before the board takes final action. Many boards find they do not hear from affected citizens until it is too late—usually because they rely on passive communications devices, such as public hearings. Boards that truly want to avoid serious controversy take active measures to inform and involve the people who will be affected. Active measures include personal contact by telephone, in person, or personal letter; ad hoc advisory committees; public opinion research, and intensive information campaigns. Different communities respond to different approaches.

3) Staff members who must implement a board decision have failed to determine who needs to know what. For example, people who are affected by a change in bus routes should find out about it long before the morning when the bus comes 15 minutes earlier. Orderly *internal* communication—from board to superintendent to staff—leads to effective *external* communication and avoids many of the causes of complaints and criticisms.

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Hello, operator, can you give me a number for the Good Fairy?

4) A member of the school board, usually one who was just recently elected, wants to be known as "the people's representative" and seeks out complaints and criticisms from citizens, students, and staff. Such activities disrupt the orderly internal communications mentioned above and undermines the ability of school employees to solve problems.

School boards that display any of the four weaknesses described here probably find their meetings crowded with people's problems and exceedingly long. No board, of course, avoids all types of complaints and criticisms indefinitely.

Different procedures for different problems—Criticisms come in different shapes and sizes. It's not unusual for policy decisions to attract the concerns of groups—residents of a neighborhood, members of an organization, or an employee union. Such groups will typically ask to appear on the board meeting agenda and procedures for responding were discussed earlier in this chapter.

School boards also must have procedures for handling the concerns of individuals. These usually are more personal in nature (a student's grades, for instance). Individual problems can come from employees as well as parents, students, and other citizens. Boards find it most effective when they establish somewhat different procedures for accomodating the concerns of groups, individual citizens, and employees. All such procedures should require efforts to resolve complaints at the lowest organizational level possible and not allow citizens, students, or employees to make "end runs" around supervisory personnel to the school board.

School boards—or even individual members—that do not require complaints to be resolved at the lowest possible level play havoc with their schools. Meetings become crowded with matters that could easily be resolved by a teacher or principal. Administrators and supervisors find they have no real power to make and enforce decisions, so the schools drift into a kind of nonmanaged status. Chaos displaces orderly internal communications. Thus begins a vicious cycle as the board undercuts its staff and breaks down communications, begetting still more complaints.

Policies for handling complaints

Policies for public complaints—Sample Policy Thirteen presents an example of a school board policy on the handling of citizen complaints. To make such a policy work, board members must cooperate by referring citizens to it and by insisting that school employees do everything they can within reason to make it work.

A typical procedure for handling complaints about curriculum or instructional materials, including textbooks and library books, is presented in **Sample Policy Fourteen.**

Policies for student complaints—Sample Policy Fifteen presents an example of a board policy on student complaints. A student complaint, of course, often becomes a parent complaint, especially if it cannot be resolved at the building level. The parent can then be referred to the policy on public complaints. Few school boards permit students to bring problems before the board, and those usually limit the subject matter to board policy matters as opposed to personal complaints. If a board does agree to hear student appeals, it should be through—and with the recommendations of—the superintendent.

Sample Policy Thirteen— Public Complaints

The Board recognizes that situations may arise in the operation of the system which are of concern to parents or the public. Such concerns are best dealt with through communication with appropriate staff members and officers of the system, such as the faculty, the principals, the central office, and the Board.

The following quidelines are suggested as the proper procedures to be followed by persons with questions or complaints:

1. Matters concerning individual students should first be addressed to the teacher.
2. Unsettled matters from (1) above or problems and questions concerning individual schools should be directed to the principal of the school.
3. Unsettled matters from (2) above or problems and questions concerning the District should be directed to the superintendent.
4. If the matter cannot be settled satisfactorily by the superintendent, it should be brought to the Board of Education. Questions and comments submitted to the chairman of the Board in letter form will be brought to the attention of the entire Board.

The Board considers it the obligation of employees of the system to entertain the questions of parents or the public.

A matter of separate consideration is the appeal of student disciplinary actions, where the law prescribes hearing requirements and action by the school board. That topic is beyond the scope of this book.

Policies for employee complaints—A school board's posture with respect to employee complaints or grievances depends upon a number of factors. Local custom and the board's relationship with its superintendent are two factors. Collective bargaining is another.

A board that recognizes employee unions may have negotiated a grievance procedure for its employees. Such procedures typically provide an appeal process for the employee who believes the administration has misinterpreted or misapplied the terms of the union contract. A school board in a unionized district also may establish by policy an appeal process for handling employee concerns unrelated to the contract. Boards in nonunionized districts also should probably have a written policy governing employee complaints.

A grievance procedure in a bargained contract ensures the union and the employee that the employer will live up to the terms of the contract. A board policy on handling employee complaints, on the other hand, provides a common understanding among board members, administrators, and employees as to:

- the kinds of issues and complaints that are subject to appeal;
- the precise steps to be followed in making such appeals, as well as actions to be avoided.

Sample Policy Sixteen presents one school board's policy on handling complaints from the staff. In considering such a policy, it is essential for boards to recognize the importance of organization ethics. No employee, for example, should be permitted to bring a complaint about his or her supervisor to a higher level without the direct involvement of that supervisor. An employee who goes around the immediate supervisor to the principal, superintendent, or a board member with such a complaint is guilty of unprofessional conduct. (An exception would be where the employee possesses evidence of criminal activities.) Board policy must clearly discourage such undercutting of the administration. The board member who privately entertains complaints directly from an employee is encouraging unprofessional conduct and possibly insubordination, a dismissable offense.

In some districts, particularly large ones, the

Sample Policy Fourteen— Public Complaints about Curriculum or Instructional Materials

If individuals or groups take exception to the materials being used by children in public schools, they may request a review and reconsideration of particular items.

The following steps will be taken:

1. The complainant will fill out an instructional material reconsideration request. This form can be obtained from the librarian or from the administrative office of the school.
2. Upon completion of the form, the complainant and the teacher/librarian will try to settle the matter between them.
3. If no agreement can be reached, the teacher/librarian will report the matter to the school administrator who, if the matter remains unresolved, will in turn refer it through the superintendent to the Board.
4. The Board may request a full review and reevaluation of the material, or upon receiving the complainant's report and staff recommendations, may make a determination in the matter.
5. The Board's decision will be final.

The Board has endorsed the Students Right to Read, The Library Bill of Rights, The School Library Bill of Rights, and the American Library Association statement on labeling as a part of its stand on student reading materials.

procedure for handling employee complaints stops with the superintendent, an assistant superintendent, or the building principal. In other districts, certain types of concerns can be brought before the board with the concurrence of the superintendent. In no event should a school board entertain complaints from employees unless the superintendent agrees and provides a recommendation regarding disposition of the complaint.

Superintendents frequently bring other members of the staff—administrators and teachers—to make reports at board meetings on various projects. Moreover, members of the board and members of the faculty and staff frequently know one another socially. In such relationships, the discussion of general educational or school district concerns can be entirely ethical and even desirable. However, an employee who uses such a relationship to lobby for the board member's support or to plant seeds of doubt about other employees or administrators is not being ethical—and neither is the board member who listens for very long.

It should be noted that a school employee is a citizen as well as an employee and may well have the same concerns as any other parent or taxpayer. Every employee, therefore, would have the same right to enter complaints and appeals as any other parent or taxpayer—so long as the issues raised are related to those roles and not to the role of employee.

Complaints about employees—Most boards listen freely to the complaints of individual citizens and groups who follow proper procedure—with one important exception. A board need not and should not entertain personal attacks on em-

Sample Policy Fifteen— Student Complaints and Grievances

Decisions made by school personnel—such as aides, teachers, or assistant principals—which students believe are unfair or in violation of pertinent policies of the Board or individual school rules, may be appealed to the school principal or a designated representative. To appeal, students will contact the principal's office in their school and provide their name, the issue, and the reason for their appeal on a printed form available at the office within two school days. The appeal will usually be decided confidentially and promptly, preferably within two school days.

The Board believes that it is especially important for any appeal involving limitation on freedom of speech—such as restricting the contents of school-sponsored publications or prohibiting distribution or posting of non-school-sponsored publications—to be decided as quickly as possible. Therefore, individual school decisions involving limitation of freedom of speech may be appealed to the assistant superintendent of the division of administrative and pupil personnel services, or that assistant superintendent's designee, after a decision is made by the principal.

However, if the principal does not make a decision within two school days following the date of complaint, students or parents may appeal at that time by contacting the Superintendent or his designee. The information provided should include the student's name, the school, and a description of the problem.

An investigation and decision will be made within two school days and communicated to the school principal and student by telephone. A written copy of the decision will also be sent to the student and principal.

ployees, board members, or other individuals at public meetings. If the board abides by civil rules of conduct it should expect others to do the same. (It's up to the president to halt efforts at sarcasm or other unprofessional conduct by members of the board, thereby retaining the moral right to impose the same standards on visitors.) The board is obligated to protect its employees against unjustified criticism or unproven charges.

Complaints against individual teachers and administrators should be brought up through the chain of command. If the superintendent brings the matter to the attention of the school board, a closed meeting is permitted by law in Illinois. From that point on, any action the superintendent might recommend to the board must be based on sound legal advice, and the board may be asked to take official action to approve a reprimand, suspension or dismissal. The major point is that school employees have legal rights that should not be jeopardized by entertaining complaints in public that may or may not be accurate.

Where a complaint is being lodged against the superintendent, of course, the board finds itself without access to the superintendent's impartial counsel. This is one issue that cannot be referred to the administration for study and recommendations. Should the board decide to hear the complaint, the hearing should be closed and the superintendent should be given ample opportunity to respond.

In hearing complaints lodged against school employees, the board may be well-advised to have legal counsel present to ensure that the meeting is lawfully conducted and that the employee's rights are not abridged. **Sample Policy Seventeen** presents one school board's policy regarding complaints about school staff.

Sample Policy Sixteen—
Staff Complaints and Grievances

The School Board recognizes that from time to time staff members may have complaints and or grievances which they wish brought to the attention of the Board. In the interest of resolving these problems as quickly and fairly as possible, such complaints and grievances should first be brought to the attention of the immediate supervisor of the complainant for resolution. If the resolution suggested at that level is not satisfactory, the complainant may then seek resolution from each higher authority in order. If not resolved satisfactorily at any lower step, the complainant may bring the matter to the attention of the Board by requesting that the Superintendent place the complaint or grievance on the Board's agenda. The complaint or grievance to the Board must be in written form and may be accompanied by the Superintendent's recommendation.

The Board will not act upon a problem originated by an employee until the employee has sought its solution through the proper administrative personnel.

Sample Policy Seventeen—
Public Complaints About Personnel

Although no citizen shall be denied the right to present a complaint about school personnel to the Board, resolution of such complaints will first be referred to the school administration for study and solution.

The District places trust in its employees and desires to support their actions in such a manner that employees are freed from unnecessary, spiteful, or unjusitified criticism or complaints. If feasible, the complainant shall be encouraged to first bring a complaint to the individual concerned. If the problem cannot be resolved with the individual concerned, it should be brought to the attention of the immediate supervisor or administrator. The individual employee involved shall be given every opportunity for explanation, comment, and-presentation of the facts as he or she sees them.

If the issue is not resolved by involvement of the immediate supervisor, the complainant can refer the issue to the Superintendent for his review and decision.

If the above steps do not resolve the concern of the complainant, he or she may request an executive session of the Board for the purpose of reviewing the Superintendent's decision. Generally all parties involved, including the school administration, shall be asked to attend such a meeting for purposes of presenting additional facts, making further explanations, and clarifying the issue. The Board shall conduct such meetings in a fair and just manner.

9. DEALING WITH THE NEWS MEDIA

Surveys show that most people know very little about school boards in general or their own school board in particular. A sizable majority in one nationwide study couldn't think of a single thing the local school board had done in the past year or even name one member of the board! One explanation for this situation is that school boards often make little effort to communicate beyond the official school family or beyond what's legally required.

School board news

Most board members make little news by themselves. That is, individual members recognize that they have no authority to act on behalf of the district and no official role outside of a legal school board meeting. They defer to an officially designated spokesman, usually the superintendent or board president. However, a board member is a board member 24 hours a day, seven days a week in the eyes of fellow citizens and news reporters. Some board members have learned (the hard way) that what they say away from board meetings may represent news—especially if it's in the form of criticism or controversy.

Experience shows that a school board's greatest opportunities to make news *as a board* revolve around meetings. And where meetings are dull, news coverage will be dull and the community won't learn much that's constructive about its school board. An exception to the dull meeting syndrome is the sudden explosion of excitement when someone stands up to berate a board member or school employee. When everything else seems dull or remote or overly technical by comparison, a brief emotional outburst by a board member, employee, or district patron can become the primary focus for news coverage.

Obtaining news coverage that provides the community with accurate insights into the work being done by the school board is a challenge in most communities. News media often assign their least experienced reporters to cover school boards. Only a relative handful of reporters specialize in school governance and the legal and practical dimensions of the problems facing school boards.

The challenge facing many school boards and superintendents in small towns is compounded by the fact that small newspapers and radio stations often can provide no staff at all to cover school boards. They are able to report only what is provided by school officials, and don't report what is not provided. School board news, in other words, goes unanalyzed and uninterpreted unless the school district itself has a staff member trained to write news.

Working with reporters

The amount of effort school officials devote to working with the news media probably depends upon the relative importance of news coverage in the district's total communications program. Some school districts supplement news coverage with newsletters, annual reports, advisory committees, public speaking, key communicator networks, and other activities designed to keep all employees and citizens informed.

The amount of effort called for in dealing with the news media also varies with the individual reporter. Experienced, capable reporters become as knowledgeable about school board issues as board members and administrators themselves. They need cooperation, but little guidance in understanding the issues. Reporters new to covering school boards usually need help in much the same way that newly-elected board members need help. Most will welcome assistance; some won't. In either case, school officials are well advised to offer any or all of the following to the new or inexperienced reporter:

- Provide the reporter with a packet of detailed information about the district, its schools and current issues.
- Offer the reporter materials to read on Illinois school law and finance in general and on local budget and finance in particular.

- Take the reporter on a tour of schools and other district facilities to meet key staff members. The reporter should see students and staff at work.
- Invite the reporter to attend any orientation sessions for new board members or any study sessions or workshops on appropriate topics.
- The superintendent and staff specialists should be available to meet with the reporter to provide information on laws, board policies, administrative procedures, and other topics relevant to school board meetings.
- As new issues come before the district, spend extra effort helping the reporter acquire an understanding of the basic facts, alternative courses of action, and any relevant laws or other constraints.

In many cases, school officials have themselves to blame when an ill-informed reporter produces an inadequate news story. The aim of effective news media relations should be to encourage accurate reporting of the major issues confronting the school board. A school board's work is enhanced when interested citizens understand the dimensions of a problem or the pro's and con's of the board's proposed action. Effective news reporting is a big help, even when it is absorbed by only a handful of key people.

Unfortunately, a few school boards get news coverage that is unduly negative. There appear to be a number of reasons:

- They invite suspicion by closing meetings too often and for reasons that are not clear. (The aim should be to build mutual respect and trust.)
- They make it difficult for reporters to obtain information. (The aim should be to help reporters get the information they need. Don't make reporters dig for bad news.)
- No one in particular is assigned responsibility for helping reporters. (The aim should be to keep this important responsibility from falling between the chairs.)

In some districts, the responsibility for working with the news media may be assigned to the school board president, secretary, or other member. More often, however, the task is assigned to the superintendent, who may in turn delegate it to a community relations officer or other administrator. One advantage of placing this responsibility in the hands of a staff member rather than a board member is that good media relations calls for daily effort. In other words, it is best considered an administrative task, although the board president may be called upon from time to time to address the media on behalf of the total board.

The steps that school officials can take to encourage effective news coverage of board meetings fall into four categories: preparation in advance of board meetings; providing for reporters at meetings; handling interviews properly, and follow-up. Here is a checklist of some considerations in each category:

Preparing for news coverage

1) Don't surprise the news media. Be sure reporters know about the meeting, including the agenda and any closed session that may be called for.

2) Assign someone to meet with the reporters prior to the meeting to review the agenda. Be sure reporters understand the issues facing the board to help them follow board discussion. But don't predict what action the board will take. If this briefing can be held several days before the meeting, news reports in advance of the meeting will help the public understand the issues coming before the board. But don't provide material to the media before it is provided to all members of the board.

3) Don't play favorites among news media; get to know all the reporters and be sure reporters know whom they can call for more information.

4) Determine whether any of the news media have special needs in covering the meeting. Some may need access to telephones, typewriters, or other equipment. An early evening deadline for a morning newspaper of the 10:00 p.m. television news may make it advisable to put newsworthy issues early on the agenda. Needs of this sort are determined by talking with reporters, not by guesswork.

5) Hold periodic seminars or news briefings on the district budget, student testing, staff evaluation procedures, and other complex topics.

6) Don't be afraid to point out items on the

FORD BUTTON

Ever since I beat him in the school board election he just sits there and mumbles about "twelve years of dedicated public service."

agenda that are of special significance and why. But don't be surprised if reporters find other things more important.

During the meeting

1) Be sure reporters are supplied with all the same materials that are provided board members, with the exception of confidential items.

2) Seat reporters at a table located where they can see and hear without straining.

3) Make a knowledgeable administrator available to answer questions of reporters throughout the meeting.

4) Encourage the board president to summarize major points of discussion and make sure everyone in the audience—reporters included—understands the action taken by the board on each issue.

Handling interviews

1) The superintendent, community relations officer, and board president might schedule a brief meeting with the media following the meeting if the hour is reasonable. Reporters may have questions that need clarification.

2) Staff members who make presentations to the board can be made avilable for interviews following the meeting or the next day.

3) Be mentally prepared for interviews, but do not memorize answers. Be conversational and polite, but stay on guard. Think through your answers before speaking. Never become angry at a question.

4) Be honest and direct, even if it hurts. People remember dishonesty long after they've forgotten the facts.

5) Do not speak "off the record."

6) If you honestly don't know the answer to a question, say so. If you promise to find an answer and call the reporter, do it promptly.

7) Don't say "no comment." If confidentiality prevents your answering, explain why.

8) Speak plain but correct English. You want to be understood, but don't want your words to make you sound like a simpleton.

9) Be brief and focus on your major points, especially with radio or television reporters. The broadcast media may give you only ten seconds of air time—perhaps 30 seconds on a slow news day.

Follow-up

1) If you've promised to call a reporter who had to leave the meeting early, do it promptly. Respect deadlines.

2) Try to see all reporters before they leave the meeting in the event there are any unanswered questions.

3) If possible, see that the recording secretary is available to reporters who need to check the wording of motions and other factual matters.

4) Keep the press informed as decisions of the board are implemented by the administration in the days and weeks following the meeting.

See **Appendix G** for more tips on working with the news media.

Closed meetings and the news media

Some authorities recommend that news people be invited to attend closed meetings of the board. Reasons given include the following:

- It helps news people obtain background information which they may need for a future article.
- It proves that the board is not discussing privately what it ought to be discussing publicly.
- It tells reporters better than any words can that the board wants to cooperate with them and respects their dignity.

It should be made clear that anyone who doesn't keep the session off the record will not be invited to future closed meetings and that competitors will be permitted to stay. By the same token, there will be closed meetings where the information shared with the board is so sensitive that the risk of liability is simply too great to advise admitting reporters (e.g., criminal charges against a student or staff member).

Obviously, the inclusion of reporters in a closed meeting is a decision that must be made thoughtfully. There are pitfalls as well as advantages, and it is probably unwise to put out the welcome mat for all closed meetings.

The news media can be helped most by attending sessions devoted to topics that will eventually be made public. They will eventually report, for example, on real estate purchases, law suits, and collective bargaining agreements. It may be in the school board's interests to give reporters access to these closed sessions—with the understanding that the information won't be used until the minutes of those closed sessions are made public by the board.

However, the minutes of closed meetings dealing with hiring and firing individual employees or student discipline probably will never be made public. The personal information presented in such meetings must be kept confidential by the school district.

Note: Closed meetings are permitted by law to protect the public interest or the rights of third parties. A closed meeting is not a device for school board convenience. Members of the board must be continuously aware that divulging confidential information from a closed meeting may have legal ramifications as well as violate a public trust.

10. EVALUATING THE SCHOOL BOARD MEETING

School boards that want to do a good job of governing their districts and seeing that their schools are properly managed cannot escape the importance of their meetings. For all practical purposes, a school board exists only while it is convened in a legal meeting.

If things are not going right, there is only one place to begin looking for the problem. Look at how meetings are conducted, how decisions are made, and how crises are handled.

A school board can set up a regular procedure for evaluating its meetings. Once a year or once every two years is probably sufficient for a review of how things are going—if things are going reasonably well. If there are trouble signs, an immediate evaluation is in order See **Exhibit E.**

There are a number of ways to approach the evaluation of school board meetings. A board with members who are generally compatible and comfortable with one another and the superintendent can use a "do it yourself" method. All they need is a checklist of major factors in effective board meetings to serve as a springboard for open discussion. Checklists are available from a variety or sources or one can be drawn up locally. See **Exhibit F.**

A board that is badly split should hire a process facilitator who can help members deal with conflict constructively. Board meetings will never improve until all members agree to work at it. The object is to draw all members of the board into an agreement on how meetings should run and then see that meetings actually are run that way. Open discussion is essential.

A variation of the "do it yourself" approach is to ask each board member to rate the board's performance on a list of items. Then have one member or the superintendent tally the results. Areas of disagreement will merit particular attention.

A school board will sometimes discover itself with procedural problems it cannot solve alone.

Exhibit E—Some Symptoms of Bigger Problems

Here are just a few of the symptoms of ineffective board meetings. The first step in eliminating the symptoms is to seek out the real cause by scheduling a meeting to evaluate meetings.

- Decisions that should be made by the administration show up on the agenda for board action.
- Major policy decisions that should be made by the board are being made by the staff.
- Items brought up for action by board members catch the superintendent by surprise.
- Items brought up for action by the superintendent catch board members by surprise.
- Some board members seem to receive more information from the superintendent than others.
- The press is regularly critical of closed meetings or other board procedures.
- Board meetings are being used as a platform to reach the public by members of the board or representatives of special interest groups.
- Meetings run too long.
- Meetings don't run long enough.
- In spite of lengthy discussions, decisions don't get made.
- There is disagreement as to what the board actually decided.
- Meetings produce ill will among board members or between board members and superintendent.
- Board decisions frequently produce unanticipated criticism.
- Citizens and employees persist in contacting board members to get their school problems resolved.

If your school board regularly experiences any of these problems, an evaluation of how the board operates will be beneficial.

Exhibit F—Meeting Evaluation Checklist

____ 1. **Planning.** Has the board developed adequate planning procedures for determining agendas and preparing back-up reports and briefings?

____ 2. **Pre-meeting dissemination.** Has the board developed adequate procedures for getting meeting materials and notices in the hands of board members, the press, and public leaders two or three days in advance of meeting dates?

____ 3. **Pre-meeting conference.** Do the board president and superintendent confer before each meeting to review upcoming business, to clarify agenda items, and to anticipate possible problem areas?

____ 4. **The setting.** Has the board found and furnished the best possible setting for its meetings?

____ 5. **Homework.** Do all board members study the agenda, read the reports, and come to meetings prepared to contribute to substantive discussions and not waste meeting time by going over matters that were already included in the pre-meeting folder?

____ 6. **Public involvement.** Has the board established an orderly method whereby the public, including students, may get a hearing at board meetings? Does the board president make public visitors feel welcome in the board room?

____ 7. **Proper role.** Has the board developed a clear policy as to the kinds of matters which need *not* be brought to the board's attention and which may be handled by administrative action?

____ 8. **Recommendations.** Does the superintendent expedite business by specifying his "Recommended Action" on each major agenda item?

____ 9. **Advice.** Does the board encourage the superintendent to invite staff specialists to board meetings to supply back-up advice and knowledge on recommended proposals?

____ 10. **Pace.** Do meetings begin on time? During meetings, does the board president keep an eye on the clock so that adequate time can be provided for important matters?

____ 11. **Clarification.** Does the board president clarify each agenda item? Does he clarify—for the benefit of board, press, and public—specific goals to be achieved? Is he adept at summarizing arguments before bringing matters to a vote?

____ 12. **Control.** Does the board president keep discussions to the subject at hand? Does he bring members to order when they interrupt the speaker who has the floor—or talk while the speaker is talking? Is he firm when firmness is required?

____ 13. **Post-meeting dissemination.** Does the administration see to it that staff, students, and the public are immediately informed as to the results of "last night's meeting?"

____ 14. **Policies.** Has the board developed an adequate set of written policies or by-laws on Board Meeting Procedures?

—Developed by the National School Boards Association

Consultants are available from universities, the Illinois Association of School Boards, and other sources to help in such situations.

A board also may feel the need for objective analysis. One approach to obtaining third-party opinions is to involve employees and citizens in rating the board's performance on a list of items. Such opinions can bring deficiencies to light, but might not produce solutions. Again, outsiders who are experienced at working with boards can bring impartial thinking to the evaluation. (Hopefully, this handbook will provide the board with most of the information and insights needed to conduct an effective evaluation.)

It should be noted, however, that many of the problems that surface in board meetings are not related to meeting procedures. A poor working relationship with the superintendent, for example, can produce various difficulties at meetings. Unless the board and superintendent have agreed on what is delegated to the administration and what is board policy, the superintendent may be bringing numerous administrative decisions to the board for action.

By the same token, board decisions that backfire may be symptomatic of:

- decisions made under pressure (failure to follow constructive procedures in responding to demands from citizens or employee groups).
- decisions made with inadequate information (failure to request additional information, obtain input from people affected, or examine alternatives).

One thing seems clear: If there is anything wrong with the way a school district is governed, it will show up in the meetings of its school board. An evaluation of school board meetings, therefore, can have ramifications for all school district operations. A breakdown in the relationship between a teacher and a parent . . . the inability of a faculty curriculum committee to agree on a reading text . . . an inefficient bus route . . . these matters are easily attributed to employee performance. But many of them can also be traced back to the fact that the school board was not prepared to make the right policy decision at the right time because its meetings are poorly handled.

Appendix A

Making the Board Meeting Work is Every Member's Job

By CLAYTON F. THOMAS

The effective school board is one that aggressively tackles its work as a unified group.

Each school board, of course, consists of individuals who may or may not care about the success of the total group—or its public image. Some members are proud to be a part of the board and take personal responsibility for making meetings productive. Other members have personal axes to grind or simply prefer to be doing something else.

Look around at the school boards you know. Note that some boards seem able to weather just about any crisis. They display little hesitancy or awkwardness in dealing with the most controversial issue in public meetings. They respond to issues as a team and emerge with solutions that leave individual members still on friendly terms with one another. No matter what the issue, the board survives intact.

Other boards never quite learn to work as a group. They have difficulty resolving the simplest problems. Their hesitancy or internal bickering give their constituents a bad impression. Such boards may spend an inordinate amount of time in executive sessions—perhaps arguing among themselves.

The difference? On the successful board, each member feels responsible for productive meetings. The responsibility is not left entirely to the board president or the superintendent

It goes almost without saying that the responsible board member comes to meetings prepared, abides by the board's rules of procedure, and respects the total board's goals and policies. Certainly nothing is more disconcerting than a board member who unseals his agenda packet at the start of the meeting. (The sound of a tearing envelope is a warning to all that someone is not prepared.) Even more difficult is the member who pursues a separate agenda.

In addition to these basic considerations, there are many ways in which the individual member influences the behavior of the total board, for better or worse. Here are some suggestions for the board member who wants to exercise a positive influence in making board meetings productive and upgrade the public's perception of the school board:

1) Use appropriate communications skills.
2) Deal constructively with conflict.
3) Deal constructively with uncooperative board members.
4) Help new board members become part of the group.
5) Encourage your board to evaluate its meetings.

1. Using communications skills

If things did not go well at your last board meeting, ask yourself how you could have helped. Did you talk too long? Were you willing to share ideas and feelings? Did you truly listen to others' ideas and feeling? Did you seek the opinions of others who were reluctant to speak? When each member feels a sense of responsibility for a successful meeting and uses reasonably appropriate communication skills, success is easily attained.

Some of the essential communication skills are *paraphrasing* in order to ensure understanding of ideas, *listening for feeling* in order to comprehend how people feel, and *giving feedback* to explain your own thoughts and feelings. Fortunately these skills are not difficult to acquire. They just take practice.

• **Paraphrasing.** The process of restating in your own words what others say and then checking it out with them is called paraphrasing. For example, after listening to a member expound on the school tax rate, you might paraphrase him or her by saying, "Then you are not in favor of a tax rate increase, is that right?" Note that the paraphrase ends in the form of a question in order to check out the accuracy of your paraphrasing. A small amount of practice will improve your skill, but it also will demonstrate that paraphrasing is possible *only if you are actively listening.* Therefore, focusing on paraphrasing eliminates the need to focus on listening as a skill. Listening becomes a by-product of paraphrasing.

• **Listening for feelings.** It is important to recognize that feelings are communicated just as ideas are, although not always with words. Facial expressions, gestures, body positions, and voice tones as well as words are clues to a person's feeling. When impres-

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sions of a person's feelings are received, they can be checked out with such statements as:

"You seem upset by what I said. Are you?"

"Am I correct that you are disappointed in our decision?"

It is important that your perception of someone's feelings be expressed as a question, not as a statement of fact.

Many times feelings are obvious but never acknowledged by either party—even though we know that these feelings are at least as important as thoughts or ideas. The significance of listening for and acknowledging feelings is that it is an excellent way to dissipate or prevent conflict. When negative feelings are identified early, they can be dealt with before a major explosion occurs. Checking out feelings also allows us to correct any misconception we might have about a person's feelings before we act inappropriately.

- **Giving feedback.** The ability to communicate our own ideas and feelings to others, particularly when these feelings are negative, is an important skill for board members. Most often, feedback is intended to change someone else's behavior. Therefore, feedback must be presented in a non-threatening manner. If feedback produces a defensive reaction, little behavior change will occur. On the other hand, the feedback cannot be so subtle that it passes unnoticed. The difference between feedback that generates a defensive reaction and that which creates a more favorable response is not the frankness of the comments. Being "politely frank" with a person can be just as unproductive as being blatantly obnoxious.

Perhaps the most important feedback skill is the ability to use *descriptive* feedback as opposed to that which is judgmental. Almost without exception, a judgmental statement intended to change another person's behavior will create resistance to change. When you say to a person who frequently uses profanity that he "is vulgar," you have made a judgmental statement. That is, you have judged the person and found him vulgar. The recipient of such a statement is likely to respond in kind with, "Your manner of speech isn't so ______ good either."

A more productive approach is to describe the impact that profanity has on you, such as: "I have listened to you for 20 minutes and you have used that word six times and each time I felt like leaving." Such feedback is not presented as a universal truth, but as one person's observation and reaction. As such, it does not put the profanity-user on the defensive. The statement leaves the recipient free to accept or not accept your feedback. It may generate some negative responses, but the seed will have been planted. The recipient will now have information about the impact of his behavior which may help him change.

It should be noted that descriptive feedback may also be of one's feeling as a result of the other's behavior. In the previous example, the statement, "I feel like leaving" is such a statement. Comments such as, "It upsets me," "I became anxious," or "I wanted to cry" statements reflecting your personal feelings, it is still important to be descriptive. To say, "*I feel you are* vulgar" is not different than saying, "*You are* vulgar." In either case it is judgmental. It would be far better to say, "Your use of profanity disturbs me," which describes your feeling as a result of the behavior.

2. Dealing with conflict

Each board member is a product of his or her own unique experiences in life. Consequently, each has different values and goals, making some conflict inevitable. The challenge for the school board is to recognize that conflict has many positive aspects and to learn how to deal with conflict so that negative features are minimized.

One positive feature of conflict is that it results in better decisions because individuals are forced to defend their positions. Open discussion allows many members to influence the decision. (Seven heads are better than one.) Conflict also stimulates people to get involved. This involvement not only improves the decisions, it gives members a chance to drain off any feelings of hostility.

It is important to recognize the positive values of conflict, because a feeling that conflict is undesirable usually results in sweeping disagreements under the rug. The result is a latent form of conflict that smolders for long periods of time, sapping the energies of the board. Eventually it bursts into heated arguments that further deteriorate relationships.

The school board must learn to bring differences out in the open early and to interact in a productive manner. This requires a combination of group processes and individual skills. Bringing conflict to the surface can be done by any member of the board who senses a conflict that needs discussing. In doing so, it is important not to make judgmental statements or assess blame. These opinions can come later.

For example, it is constructive to say, "I'm unhappy with the district's textbook policy."

It is destructive to say, "Last year's board used poor judgement in developing what is obviously a lousy textbook policy."

In the first example (which describes your feelings) the natural response is simply, "Why are you unhappy with the policy?" In the second case (which judges both the policy and the previous board) the natural tendency for veteran board members is to defend the policy saying, "I suppose you think you can do better." The ensuing conflict will be a win-lose venture in which the losers will be unhappy and seek their revenge at another time. In the long haul, everyone will probably lose.

Once a conflict is brought to the surface, it is best dealt with openly in a problem-solving session where ideas are expressed and feelings shared. The aim should be to reach a consensus on the issue. This does not mean a unanimous vote is essential nor does it mean everyone has to agree. "Consensus" simply means that:

- All board members have expressed their opinions and feelings, and
- Everyone is willing to support the decision or at least willing to go along with the decision without sabotaging it.

Of course, some decisions reached by consensus must subsequently be voted on to become a matter of official record.

Most people instinctively try to avoid conflict. During a discussion of conflict issues, it helps to keep in mind some of the ways that we typically avoid dealing effectively with conflict issues. In fact, it would help to permanently display a list of these behaviors in the school board meeting room. We are all guilty of these destructive behaviors when conflict arises and need to be reminded from time to time:

- Making attacking statements (i.e., that's stupid)
- Interrupting
- Talking in the third person (i.e., *they* think, rather than *I* think)
- Muddying the waters
- Changing the topic
- Withdrawing from the discussion

The behaviors that help deal constructively with conflict are:

- Listening and trying to understand
- Stating your own ideas, opinions, and feelings

As strange as it may seem, a common characteristic of most people in conflict situations or when dealing with controverisal issues is to avoid admitting their own feelings. Such statements as "The citizens won't accept a district-wide sex education program" represent a common way of copping out. Such a statement does not provide a good point of discussion, because the speaker has not expressed his *own* feelings. For example, does the speaker feel that sex education is valuable and should be implemented? Or does the speaker dislike the program on moral or religious principles? Maybe the speaker likes the program but believes the community's response will be too unfavorable. Each of these interpretations of the statement suggests a different course of action or different topic of discussion for the board. Therefore, the sooner everyone's position is known, the sooner the group can come to grips with the real issue. Again, this involves a sincere effort to state your own ideas and feeling.

3. Working with the uncooperative member

Passing judgment on the behavior of others is always a dangerous practice. Attempts to change that behavior is even more so. Most of us generally behave as we do because (1) we are not aware of how our behavior is being perceived and (2) we are acting out some basic need, such as a need for belonging or status within the group.

In considering ways to deal with the uncooperative board member, one thing is worth remembering: we can only change our own behavior, not the behavior of others. If we expect others to do something different, we must ourselves do something different first. For example, *telling* people that they need to prepare for meetings, consider all the options before deciding, avoid becoming involved in administrative matters, or speak respectfully to others will not have much impact. However, *doing* something—such as holding new board member orientation sessions where a "problem" member plays a leadership role—may have an impact.

Sharing your negative feelings in a positive way rather than giving advice may motivate an individual to reconsider his behavior. Keep in mind that many times behavior can be improved by meeting an individual's basic needs for belonging and for recognition and status within the group. Ask yourself, "what have we done to make the uncooperative board member feel he or she belongs?" "What have we done to meet the ego-status needs of the individual?" Answers to these two questions, accompanied by appropriate behavior changes on your own part, frequently produce surprising results.

4. Helping the new board member

Newly-elected board members come to their first meetings as "outsiders" with ideas to share and a strong desire to belong. To be sure, a few come with their armor polished and their axes sharpened. In either case, the first objective of incumbent board members should be to achieve a level of "belonging" for each new member.

Each new board member, whether he is conscious of it or not, must find an answer to the question, "Who or what am I to be in this group of board members?" Until such feelings and emotions are dealt with, the individual will have difficulty functioning as a part of a team.

As new members struggle to establish an identity within the group, their behavior may take different forms. Some may be aggressive, some may be humorous, and others become listeners.

Eventually, each member finds a comfortable role which seems appropriate for this particular group. Once this role is found, the member will begin to feel a part of the group and begin to seek a share of the power and influence that the board of education controls as a group. The new members' behavior at this stage may consist of fencing, testing each other out, or overaggressiveness. These behaviors among new board members are normal, but some tension will be evident.

During this period of getting acquainted, all members of the board will be preoccupied with their own feelings and less able to listen to each other. Yet, this process of each board member and each board going through these growing pains is the way a board becomes a real group capable of a team effort.

In reaching a comfortable level of mutual trust, each member's attitudes and skills are important. The goal is to lead the new member to a sense of personal responsibility for the performance of the total board. To achieve this, each incumbent board member must feel partially responsible for helping the new member acquire a feeling of belonging.

Part of the task is accomplished by providing the new member with information and opportunities to acquire knowledge and skills. The rest of it depends on patience, understanding, and involvement.

5. Evaluate your meetings

It is a wise board of education that frequently takes stock of its meetings. A few minutes of discussion before adjourning can alleviate many potential problems. Talking about how the meeting went (not what was decided) can help all members, particularly new members.

For example, if the meeting took longer than expected, discuss why. If you felt you had insufficient information to make a good decision, share your concern. If you were able to achieve consensus early, consider why the board seemed so productive.

It is far better to discuss these items as a group than it is to talk about them as you leave the meeting or complain to your spouse when you get home. This occasional self-analysis by a board should not take the place of an annual evaluation involving the superintendent. It will, however, make an annual evaluation much less traumatic.

These five steps should help any group of board members work together more effectively. In fact, if only one member puts them into practice with persistence, the beneficial results can be startling.

Appendix B

An Organized Approach to Filling School Board Vacancies

By A. VITO MARTINEZ

Every school board at one time or another must face the task of filling a vacancy.

If two or more people are interested in filling the school board vacancy, the remaining six members have to make a choice that's bound to displease someone. Consequently a lot of boards view the filling of vacancies as an unwelcome hassle.

With some advance planning, however, it doesn't have to be that way. In 1973, the school board at Valley View C.U. District 365-U decided to establish some procedures to eliminate the confusion and emotion that often surround appointments. In the four years since then, the procedures have been used to fill five vacancies. The process has gone quickly and smoothly each time.

More importantly, the Valley View board believes it has grounds for saying that the best qualified candidate was selected each time.

It's important to note that a school board has 30 days in which to fill a vacancy. If the board fails to act within that time, the appointment is made by the superintendent of the educational service region. In either case, the appointed member serves until the next election, at which time the unexpired term is placed on the ballot.

Some boards have avoided the haggling associated with appointments by waiting out the 30 days and letting the regional superintendent fill the vacancy. The Valley View board, however, considers a vacancy too important to shift the responsibility elsewhere. A vacancy presents us with a challenge to maintain our standards for excellence.

Put another way, if we can't do a good job of handpicking a board member, how can we expect our administrators to do a good job of selecting staff members? In addition to maintaining an effective school board, we have to set an example.

The procedure for screening candidates and making an appointment has two purposes:

1) Ensure selection of the most qualified applicant.
2) Avoid haggling and hard feelings.

This implies that the board knows what makes a good board member. All members of the board must agree in advance on the desirable qualifications. These qualifications can vary from board to board, depending upon how members view their role and the kinds of problems facing the district.

At Valley View, the aim is to appoint the person *who can be of the most help to the board.* This criterion may not be suitable for all boards, but we want every member of the board to carry a proportionate share of the load.

In order to assess the contributions that each candidate can make to the board, we developed a list of 11 related attributes. They range from "desire to serve" to "knowledge of schools and board organization" and "availability."

Each school board should determine for itself the qualifications considered most important. These have worked well for the Valley View board—but the important thing is that all members of the board must be committed to them. If different members are evaluating candidates by different criteria or different standards, they are bound to disagree on who is the best appointeee.

With these criteria in hand, the board sets about recruiting and screening. The Valley View process can be carried out in as little as one week. Here are the steps:

1) Announce the vacancy through the news media and ask interested persons to notify the board president. All candidacies are confidential, of course, and all board discussions take place in executive session. Only the final vote on the appointment takes place in public meeting.

2) The total board interviews each candidate. Each board member uses a rating sheet (on page 68) as a guide in asking questions and evaluating responses. Interviews are designed, of course, to determine how well the candidate fulfills the board's agreed-upon criteria.

3) Following the interviews, each board member individually lists all of the candidates who are acceptable—that is, those that meet the qualifications.

4) The board president tabulates the results and determines which candidates show up on all the lists—or at least those which show up most frequently. The aim is to get the top three candidates.

A. Vito Martinez is president of the Valley View C.U. District 365-U Board of Education. This article is reprinted from the January-February, 1978 issue of *Illinois School Board Journal.*

5) The board then meets in executive session to discuss the top candidates. Although the rating sheets are not collected or tabulated, they serve as a basis for discussion among board members.

6) Following discussion, each board member lists a first choice and a second choice for the appointment. The president tallies the results, giving two points for each first choice and one point for each second choice.

7) The board president then recommends for appointment the candidate with the most points. This candidate is asked to attend the public meeting at which the recommendation will be made and the vote taken. All other candidates receive a letter thanking them for their interest.

Probably the critical part of the process is the interview. Here is where board members must decide how well each candidate measures up. Questioning properly is extremely important.

For example, in determining a person's level of interest, the board examines past school activities. Does the candidate take part in parent organizations? Attend board meetings? Has the candidate ever run for board election?

Candidates receive credit for experience in fraternal organizations, because this indicates a desire to serve the community. It also scores high if the candidate can display some knowledge of the schools and how the board functions.

The board asks the candidate to identify district priorities. This indicates a knowledge of the district's direction and major concerns.

The Valley View board thinks a board member should know the difference between the board's role and the superintendent's role and be willing to honor it. The candidate's attitude in this regard is extremely important.

The board also looks for people with different skills and perspectives. For example, a board needs members with management experience.

If a candidate exhibits a concern for only one school or neighborhood or other sign of narrow thinking, the board asks deeper questions. The aim is to get a person who wants to represent the entire district and to avoid those with axes to grind.

If the school board is prepared, a vacancy can be viewed as an opportunity rather than a hassle. This process has worked five times in Valley View with a minimum of confusion and politicking. The same process or one like it should work anywhere.

School Board Candidate Evaluation

1. Unsuitable
2. Fair
3. Good
4. Excellent
5. Outstanding

Candidate's Name ______________________________

Interview Date ______________________________

Subject	1	2	3	4	5	Comments
A. Desire to Serve and Past Interest in School Activities						
B. Fraternal Organization Experience						
C. Governmental Experience						
D. Knowledge of Schools and Board Organization						
E. Identification of Board's Priorities						
F. Non Parochialism Attitude and History						
G. Relationship of Livelihood to Board Duties						
H. Attitude Toward Board Teamwork						
I. Attitude Toward Board/Administrator Relationship						
J. Daytime Availability						
K. Evening Availability						
CONSENSUS RATING						

Appendix C

Plan Ahead with a Twelve-Month Agenda

By GARY ASHLEY

The agenda has become the most important tool the local board uses to conduct its business. It is a diagram whereby the board can proceed with one item of business to another in a methodical manner.

An effective board meeting will proceed smoothly and efficiently if the agenda is prepared with an itemized order of business and each item is supported with adequate information and/or recommendations.

Preparing an agenda for the regular board meeting is normal procedure for most boards, but how often have you or your colleagues said:

1) we should spend more time reviewing and developing policy;

2) too many administrative and trivial items appear too often on the agenda;

3) we are not using our meeting time wisely;

4) too often we are asked to approve something because it's "due now;"

5) we do not allow time to discuss new and/or pending legislation which is before the legislature;

6) we should spend more time in setting goals and priorities;

7) we should spend more time in determining our progress as a board and measuring the system's objectives, and we do not have enough background information to vote on agenda action items;

8) we should spend more time in setting overall budget priorities for two years, three years, maybe five years.

In order to establish a plan for the board to conduct its business on an annual basis, a 12-month agenda is a possibility. The 12-month agenda does not replace the regular agenda, but is a schedule where certain items and programs are reviewed, considered, and approved by the board during the current school year.

Developing a 12-month agenda requires time and planning. The board and superintendent (also, key central staff) can schedule a retreat for this purpose. The retreat should be scheduled during early spring and the only item of business is to develop the 12-month agenda for the following year.

What are some advantages to planning a 12-month agenda? The board can:

1) establish review dates for previously adopted policies;

2) establish dates for recurring administrative items that must be acted upon;

3) establish dates for various community groups to express their concerns;

4) establish dates for the staff to present pertinent information on important topics for consideration;

5) establish dates to review the system's goals and objectives;

6) establish a planned procedure well in advance for approving the budget for the next fiscal year;

7) establish review and approval dates for annual program plans required by state and federal departments;

8) establish dates for the board's self-evaluation, and evaluation of the superintendent and the school system;

9) schedule for attendance at district, state and national school board meetings.

A 12-month agenda can give leadtime for the board to study and consider many important decisions it will make during a year. This procedure can also provide the superintendent and staff adequate time to prepare good information and recommendations for the board.

An organized agenda for regular meetings and planing on a yearly basis, by using a 12-month agenda, should expedite and improve the quality of the conduct of the board's business.

Gary Ashley is executive director of the Georgia School Boards Association. This article is reprinted with permission from the *GSBA Bulletin* where it first appeared in April, 1979.

Appendix D

Using the Board Meeting as a Public Relations Tool

You have to have board meetings anyway—with a little extra effort it's possible to turn the routine meeting into a valuable communications tool. Following are some tips on making them inviting, interesting, and informative.

Before the meeting

- In addition to the unavoidable routine matters, schedule a portion of each meeting for special presentations on exciting programs, reports by special committees of their findings and recommendations, or a discussion of a current problem or issue by a knowledgeable staff member. Keep the presentations brief and lively, and allow time for questions.
- Consider devoting one meeting a month to the 'dull stuff'—routine financial and operational matters—and reserving as much as possible of a second monthly meeting to discuss goals, programs, and so forth. This not only makes for an interesting meeting, but sets aside time for important matters that often become buried in routine business.
- Prepare as much background materials as necessary to clarify major agenda items. Make available copies of reports, budgets, letters, and any other relevant materials to the news media and public. There's nothing more frustrating than trying to follow a discussion of material you haven't seen. "Executive summaries" aid understanding where material is burdensome and complex.
- Adopt and publicize written policies on how the board handles agenda development, public participation, and new business. Well-understood policies avoid misunderstandings when the board encounters complaints, petitions, emergencies, and other unplanned situations and surprises.
- Publicize the meeting well in advance, not just time and place, but important topics that will be discussed. If any special awards and presentations will be made, publicize those, too.
- Mail agendas and backup information to news media and to key citizen groups ahead of time. Make the material available at the door as well.
- Consider whether any presentation or discussion item lends itself to audio-visual illustration. Don't overdo it, but occasional slides, filmstrips or other materials can lend interest.
- Recognize student, staff, and other achievements at meetings, but keep it brief. Long eulogies are boring and inappropriate.
- If the district is large, consider holding occasional meetings in different areas of the district.

Physical setting

- Treat visitors as the taxpaying constituents they are. Make people feel welcome and wanted.
- Be sure the room is large enough and that there are enough chairs. If a controversial topic is scheduled, you may need a larger-than-normal meeting room.
- Have plenty of copies of agenda, background material, ground rules for public input, and other relevant information available at the door.
- Schedule a break or two in the agenda. If feasible, offer coffee or other light refreshment.
- If visual presentations are planned, make sure equipment has been checked carefully and that somebody knows how to use it. If charts or other poster-type materials will be used be sure they are big enough to be seen easily by the audience.

Running the meeting

- Follow clear rules of procedure for an orderly, smooth meeting, but don't allow proceedings to be derailed by trivial points of order.
- The presiding officer should keep firm control of the meeting at all times, never allowing personalities to intervene in the discussion.
- Be receptive to members of the audience. If a question can't be answered at once, promise to get back to the inquirer, and be sure to do so. However, encourage parents and others with problems to follow administrative channels first. The board should be only a "final appeal" for matters involving student-teacher relationships and the like
- Do everything possible in public. When lawful confidentiality requires a 'closed-door' discussion, be sure reporters and audience understand clearly the reasons for the private session.
- Never allow the board to become sidetracked into discussions of matters on which information is not available. Unless a true emergency exists, table the topic until information can be compiled and studied.
- The day after the meeting, circulate a simple bulle-

tin to the staff (and key community leaders) to head off any rumors or misunderstandings about board actions.

Helping the reporters

- Recognize that it is in your interest to help reporters prepare clear, accurate stories. Many more people will read about the meeting in the newspaper than ever will attend one.
- Recognize that the reporters who cover board meetings are often inexperienced and know little about technical school matters. Designate a representative of the board to serve as spokesperson and be sure all reporters have his or her office and home telephone numbers.
- Distribute agendas and plenty of background materials as far in advance of the meeting as possible. Provide telephone numbers of the person(s) who can answer questions on important agenda items. Consider meeting with the press prior to the board meeting to provide background on complex or technical agenda items.
- Set up a press table close to the board and seat a knowledgeable staff member there who can answer questions as the meeting progresses.
- However late the meeting ends, someone should stick around to answer reporters' questions. Reporters for the morning papers must write their stories immediately, and answers that come the next day are too late.

Reprinted from *Communication Tips*, Illinois Association of School Boards School PR Service.

Appendix E—Quick reference and guide to parliamentary procedures

	ORDER OF MOTIONS	MAY APPLY TO FOLLOWING MOTIONS	May Interrupt One Who Has Floor	Mover Must Be Recognized	REQUIRES A SECOND	DEBATABLE	VOTE REQUIRED	MAY BE RENEWED	MOTIONS THAT MAY APPLY TO IT
PRIVILEGED MOTIONS	1. TO FIX TIME OF NEXT MEETING	None	No	Yes	Yes	Not when privileged	Majority	Not for same time	Amend, Reconsider
	2. TO ADJOURN	None	No	Yes	Yes	Not when privileged	Majority	Yes, after progress	None
	3. QUESTION OF PRIVILEGE	None	Yes, if Necessary	No	No	No, but a resulting motion is	Decided by chair	After progress	None apply to question of privilege, but all may apply to resulting privileged motion
	4. TO CALL FOR ORDERS OF THE DAY	Any special or general order	Yes, to call for a special order	No	No	No	None — takes 2/3 vote to postpone special order	Yes, except special cases	None except to postpone orders
INCIDENTAL MOTIONS	5. RISE TO A POINT OF ORDER	Any motion or act	Yes	No	No	No	None unless appealed, then majority	No	None
	6. APPEAL	Any decision by the chair	Yes	No	Yes	No	Majority	No	Lay on table, close debate, reconsider
	7. TO SUSPEND THE RULES	Any motion where needed	No	Yes	Yes	No	Usually 2/3 (see Constitution)	No, except by unanimous consent	None
	8. TO CREATE SPECIAL ORDERS	Main motion	No	Yes	Yes	Yes	2/3	After progress	All
	9. TO WITHDRAW (or renew) A MOTION	Any motion	No	Yes	No	No	Majority	After progress	Reconsider
	10. VOTING – "Division" Motion To Ballot	Any		No	Division, no; Ballot, yes	No	Majority	Does not apply	None
	11. OBJECTION TO CONSIDERATION	Main question and questions of privilege	Yes	No	No	No	2/3 in negative	No	Reconsider
SUBSIDIARY MOTIONS	12A. TO LAY ON THE TABLE	Main question, appeals, questions of privilege or reconsider	No	Yes	Yes	No	Majority	After progress	None
	12B. TO TAKE FROM THE TABLE	Only to motion that was tabled	No	Yes	Yes	No	Majority	After progress	None
	13. CLOSE DEBATE	Any debatable motion	No	Yes	Yes	No	2/3 Majority	After progress	Reconsider
	14. TO POSTPONE TO CERTAIN DAY	Main motion, questions of privilege or reconsider	No	Yes	Yes	Yes	Majority	After progress	Amend, reconsider, limit or close debate
	15. TO REFER	Main motion, questions of privilege	No	Yes	Yes	Yes	Majority	After progress	Amend, reconsider limit or close debate
	16. TO AMEND OR SUBSTITUTE	Main motion, limit debate, refer, postpone definitely, fix time of next meeting	No	Yes	Yes	Yes	Majority	No	Amend, reconsider, limit or close debate
	17. TO POSTPONE INDEFINITELY	Main motion, questions of privilege	No	Yes	Yes	Yes	Majority	No	Limit or close debate, reconsider ("I" vote only)
	18. MAIN QUESTION (or motion)	No other motion	No	Yes	Yes	Yes	Majority	Not at same session	All
	19. TO RECONSIDER	Any motion except adjourn, suspend rules, lay on table	Yes, for entry	No	Yes	Yes	Majority	No	Limit or close debate, lay on table, postpone definitely
	20. TO RESCIND	Main motions, appeals, questions of privilege	No	Yes	Yes	Yes	Majority	Not at same session	All
	21. ELECTIONS (Nominations)	None	No	Yes	No	No			None

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Appendix F

Presidential Style—Unique as Fingerprints

By FRED M. HEDDINGER

The way in which an individual school board president defines his role as a leader may be as unique as his fingerprints. As long as he accepts certain important responsibilities, his approach isn't crucial to his success—it's purely a matter of style.

Many school board presidents believe that their role should be to serve as a strong leader for other board members and for the superintendent and his staff. Under such an agreement, the board president may choose to do these things:

1) Serve as chief spokesman for the board.

2) Keep abreast of local, state, and national educational issues through direct involvement in various conferences and programs dealing with such issues.

3) Participate in local, state, and national organizations which have an impact on public education.

4) Impart to the board members and to the superintendent and his staff a perspective and point of view which result from such active personal participation.

5) Help establish for the school district, through discussion with other board members and the superintendent and his staff, goals which are in tune with the needs and resources of the community.

6) Assign committees that will help research and provide information to the board-at-large on special issues.

7) Serve as a personal counselor, or informal sounding board, for the superintendent as he grapples with some of the problems that confront him, recognizing that such a role carries with it the need for confidentiality and utmost discretion.

8) Personally run the school board meetings and personally follow up to see that agreed-upon action is implemented.

School board presidents who use this style of operation are both successful and unsuccessful. When successful, they are sometimes outstanding. When unsuccessful, the results may be disastrous.

Other school board presidents believe that their role should be to function as a catalyst rather than as a strong personal leader. Under such an arrangement, the board president may choose to do these things:

1) Appoint someone to serve as chief spokesman for the board.

2) Involve other board members and the superintendent and his staff in conferences and programs dealing with educational issues.

3) See that the board and the school district participate in local, state, and national organizations that affect education.

4) See that persons who do participate in such activities share their information and points of view with those who have not participated.

5) Look to the superintendent and his staff and to the other board members for recommendations concerning the goals and possible programs of the school system.

6) Periodically provide opportunities for the superintendent and the board to discuss informally some of the concerns of the superintendent, both personal and professional

7) Deliberately limit the amount of personal involvement and time spent on school board affairs.

School board presidents that use this style of operation are also both successful and unsuccessful. When successful, they have also involved other people to the degree that some of this success is also shared with them. Similarly, when unsuccessful, others who have played a role must share in the lack of success. Even when unsuccessful, this model tends to limit or moderate the degree of failure so that disastrous results are less likely to occur.

These two models, or styles, are obviously not the only styles by which a school board president can function, nor are these characteristics necessarily the most important to be considered. Rather, they are used to illustrate that there is no single model for success or failure in your role as a school board president. Whether you choose to use one of these models, or a mixture of both of them, or some other model of your own design, there are certain things for which a school board president should accept responsibility beyond those things that are mandated by school law. A board president should make sure that his board has a clear understanding of policy regarding:

Fred Heddinger was executive director of the Pennsylvania School Boards Association when he wrote this article for the *PSBA Bulletin*.

1) Who will be spokesman for the board.

2) Who will have responsibility for development of agenda items for board meetings and for preparation and distribution of an agenda.

3) The way in which the board will communicate and give direction to the superintendent and his staff.

4) The way in which board members and the superintendent and his staff will participate in local, state, and national programs and organizations so that all parties know how the school district will be involved in, and kept abreast of, educational issues and concerns.

5) The way in which information will come before the board for consideration and action.

6) The working relationship with the superintendent and his staff.

7) The orderly and thorough development of information related to issues on which the board must act.

8) A proper method to inform all persons affected by a board action, or proposed action.

While it is true that the personal style of school board presidents will vary greatly, these eight "make sures" will greatly help to ensure the success of your role as a school board president, no matter what your style may be.

Some school board presidents serve for one year, some serve for many years. Some are catalysts; some are strong, dynamic leaders; and some are binders who tend to bring other people together on a common issue or objective. No matter which, we hope that these suggestions will be helpful to you as a leader of educators.

Appendix G

Working with the News Media

> "Absolute freedom of the press to discuss public questions is a foundation stone of American liberty." Herbert Hoover
>
> "An editor is someone who separates the wheat from the chaff—and then prints the chaff." Adlai Stevenson II

The local news media can be among your most effective, helpful channels of communication—or they can make your life a misery either through lack of understanding or outright hostility.

Either way, you have to deal with the news media, and it's worth the additional effort to enlist them in your cause. Following are some general tips on dealing with the media and suggestions for solving specific media relations problems.

Some principles

Principle #1: **Reporters are people—with jobs different from yours.**

- Get to know local news executives, but keep in mind most of your contacts will be with reporters. Never go over a reporter's head unless the situation is critical.
- Get to know the reporters who cover your schools. Remember their names and chat informally from time to time. This is a continuing process, as turnover is rapid, but worth the time. A common interest in Chinese cooking or scuba diving can help smooth over minor problems.
- When a new reporter comes on the scene, set up an information meeting to discuss the problems and issues facing the system. Introduce him or her to board members and key administrators. Provide telephone numbers—office and home—for those who can answer questions. Let the reporter know you will be in touch when something is happening (or about to happen)—then keep your word.
- Never play favorites. Be equally friendly with all reporters and call all media when something happens.
- If a problem arises—a hostile story, the overlooking of 'good news' or just plain mistakes—don't let it fester. Get in touch right away and discuss what can be done to straighten things out.
- Never be hostile to a reporter. You may feel justified, but the reporter nearly always holds all the cards.
- Authorize several administrators and one or two board members to serve as spokespersons so the reporter stands a good chance of being able to reach someone on short notice. "Unavailable for comment" never makes you look good. (In highly sensitive situations, it may be necessary to have only one spokesperson. Explain why to reporters.)
- Be aware of reporters' deadlines. Often, an answer or comment is needed 'right now' if it is to be useful.
- Recognize good reporting, even if the news is negative. Call reporters—or better yet, drop them a note with a copy to the editor or news director—to compliment thorough, accurate reporting.

Principle #2: **There's no place to hide.**

- Do everything you can in public. This will increase your credibility with media and public alike.
- Never try to cover up mistakes, problems, or other bad news. Too much is public information by law, too many people know, and eventually it's going to get out. Take the attitude that "the public has an obligation to help solve public school problems."
- By announcing bad news yourself, you retain some control and gain a reputation for courage and candor that will pay off. Present bad news in the most favorable light possible, of course, and mention any mitigating factors, but don't try to gloss it over.
- Keep a sense of proportion. Readers and listeners have short memories, and an isolated bad news incident will soon be forgotten. A reputation for dishonesty lives on forever.
- Nothing is ever off the record. If you say it to a reporter, you can expect to see it in print.
- Never be afraid to decline comment, but be prepared to explain why. If you don't know the answer, say so and help the reporter find the information. If the matter is properly confidential, explain why.

Principal #3: **Have a policy on dealing with news media.**

- Be sure all administrators know part of their job is to answer media questions.
- Outline what is and is not public information.
- Hire a professional public relations person if you can. If not, make sure someone has the specific responsibility to contact news media about significant developments, mail out copies of reports and documents that might be useful, and so forth.

- If you have a public relations person, make sure he or she is fully integrated into the administrative team and fully informed of what's going on in the schools. Also, recognize that a reporter who needs specific information should be able to talk directly with the administrator who is best informed.

Some problems

Problem #1: **Our reporters aren't hostile, but they sure make a lot of mistakes.**

- Often the education reporter is the 'new kid' on the staff. Even if the reporter is experienced, there will be a lot he or she doesn't know about education. You may feel it's not your job to educate reporters; but it is if you want accurate coverage.
- Be generous with copies of reports, budgets, and other helpful documents.
- Speak and write English. Eschew obfuscation. (Say "talk to parents" not "implement conferencing procedures.")
- Hold periodic press *briefings*—not press *conferences*, which should be called sparingly to make significant announcements—but informal discussions of on-going planning, problems, progress.
- Key administrators and a board spokesman should be available to answer reporters' questions. You might consider providing home phone numbers as well as office numbers—a good reporter won't abuse the privilege.
- Make a special effort to explain financing (and other particularly complicated topics). Consider scheduling a 'seminar' to explain the budget.

Problem #2: **We get good coverage in general, but board meetings are a problem. Reporters leave early, report only the fireworks, make mistakes.**

- Many of these problems arise from tight deadlines. Try seating a key administrator or two, as well as the public relations person, at the press table at meetings to answer questions on the spot. No matter how late the meeting ends, stick around to answer reporters' question—those writing for a morning paper or radio newcast can't wait until morning.
- Often reporters have to cover more than one meeting in an evening. Offer to call the reporter after the meeting. Don't forget to do it.
- Send out your own report of the meeting to news media the next day.
- Include interesting presentations on important programs, plans, achievements in the meeting.
- Be sure reporters receive the agenda with all background information far enough in advance to prepare for the meeting.
- Don't let the meeting get out of control. Strike a balance between efficiency and open discussion. Don't let the meeting deteriorate into a free-for-all, don't dwell on personality conflicts among board members—nothing makes more colorful copy.

Problem #3: **They only print (or broadcast) the bad news.**

- Talk with reporters and their bosses as well. News space and air time is strictly limited and bad news generally is more dramatic than good; but if editors and news directors are made aware of the problem, they may make a special effort to get out more balanced news.
- Be aggressive—send news releases, call news conferences (but only for truly important items or you'll lose credibility), arrange media 'events' such as tours of facilities, special presentations or coffees with some top teachers to talk about teaching or learning.
- Be sure to explain why the 'good news' is significant. Don't expect reporters (or their readers and listeners) to understand what test scores mean or to know that your new reading program is a major break-through.
- Be honest and open in dealing with reporters in 'bad news' situations—they'll remember it when you call to tell them something good.
- Don't rely solely on the news media for your communications. Develop and use other channels (newsletters, personal contact).

Problem #4: **Negotiations.**

- Be honest and direct; say simply, "Sorry, but I can't comment because . . ." when that's the case.
- Never get hostile or berate reporters for trying to worm out information. That's their job. On the other hand, don't get cornered into saying something you shouldn't.
- Consider joint progress reports if the union is amenable. There's no better evidence that negotiations are proceeding smoothly.
- If negotiations are going badly or have broken down don't be the heavy. Don't denounce your opposition. Be reasonable and be positive.

Problem #5: **Total warfare.**

- First, make sure your own house is in order. If you don't have a policy for dealing with the media, develop one, and educate your personnel in the principles listed above.
- If past sins by the school board or administration are to blame be sure the policy addresses them. Be able to promise that, for example, you will never again hold a secret board meeting.
- Set up a meeting with news executives and reporters and hash out the problem. Explain your policy and the reasoning, discuss information disclosure laws, and the open meetings act. Ask how you can make it easier for them to cover the schools.
- Don't be hostile, but don't be defensive, either. Approach the problem as a mutual one.
- Try to get the media to 'buy into' school problems. Enlist their help in explaining school problems and policies to the community. Appeal to community pride. It might work.

Problem #6: **We tried all that and it didn't work.**

- In the rare instance where a news medium sees itself as an implacable adversary, just try to stay above the battle. don't be drawn into the conflict. **You cannot win.**
- Redouble your eforts to get the news out in other ways. Start a newsletter (or revamp your existing one) to provide a 'mini-newspaper.' Report the problems, issues, programs, progress. Report on board meetings (warts and all). Do not attack the local media under any

circumstances. Just correct any misinformation or distortions in a factual, cool way.

- If you don't have a professional public relations person, get one. If it's war, you need a trained general.
- Make use of equal time and public service time on radio and telelvision; but again, don't use it to attack. Just tell your story clearly and without recrimination.
- Submit letters to the editor and editorial statements to the local newspapers. If they don't use them, print them in your newsletter with a simple, unemotional explanation.
- Be especially careful in your dealings with reporters to follow the above guidelines. Be cordial, do not withhold legitimate information, be available to answer questions. Don't give a hostile reporter an excuse to do a negative story.
- Be especially careful not to say anything in public that you do not want quoted in print or over the air.

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Appendix H

Related Reading

Every board of education should build a library for the continuing enlightment of its members—and future members. Here are some suggestions for publications dealing with board meetings that would benefit such a library.

Becoming a Better Board Member. Washington, D.C.: National School Boards Association, 1982. Available in Illinois from the Illinois Association of School Boards.

Developing Leadership for Parent/Citizen Groups. Columbia, Maryland: National Committee for Citizens in Education.

Effective Meetings: Key to School Boardsmanship. Alexandria, Virginia: National School Boards Association, 1986.

Effective School Board Meetings. Davidson, Jack L., West Nyack, N.Y.: Parker Publishing Co., Inc., 1970.

Effective Schools Through Effective Management. Klingenberg, Allen and Genck, Fredric, Springfield, Illinois: Illinois Association of School Boards, 1978.

Guide to the Illinois Open Meetings Act. Springfield, Illinois: Attorney General of the State of Illinois, 1988.

Illinois School Law (Volume I and Volume II). Diamond, Stewart H., General Editor, Springfield, Illinois: Illinois Institute for Continuing Legal Education, 1985, and 1988 Supplement.

Parliamentary Procedure: Tool of Leadership. Broadrick, King, Bloomington, Indiana: Phi Delta Kappa, 1974.

Robert's Rules of Order Newly Revised. Glenview, Illinois: Scott Foresman and Company, 1970.

School District Records and the Illinois Freedom of Information Act. Barnicle, Terrence M., Springfield, Illinois: Illinois Association of School Boards, 1984.

The School Official's Guide to Student Disciplinary Hearings. Cartwright, Gene and Schwartz, Allen, Springfield, Illinois: Illinois Association of School Boards, 1986.

Other IASB PUBLICATIONS You May Want

THE EFFECTIVE SCHOOL BOARD MEMBER, by William G. Alberts. Provides an introduction to the work of Illinois boards of education. 32 pages; 1981, revised 1989. Price: $1.00.

BECOMING A BETTER BOARD MEMBER, by the National School Boards Association. A "how-to-do-it" manual covering the art of board membership, board decision making, selecting and evaluating the superintendent, school finance, leadership, collective bargaining, curriculum and instruction, state and federal regulations, community relations, and much more. Includes helpful hints based on interviews and surveys of hundreds of board members and administrators. 300 pages; 1982. Price: $14; IASB Members, $10.

PLANNED APPRAISAL OF THE SUPERINTENDENT by R.R. Booth and G.R. Glaub. Reviews the legal and practical aspects of the board-superintendent relationship and the ways in which various types of boards relate to their superintendents. Describes different evaluation methods, their uses, advantages and disadvantages. Explains a process for developing a performance appraisal system tailored to local needs, including the identification of management functions, clarification of roles and responsibilities, and setting of standards and priorities. The 88-page handbook contains sample forms, policies, etc. Price: $6; IASB Members: $4.

SCHOOL DISTRICT RECORDS, by Terrence M. Barnicle. A guidebook for local school district officials on how to comply with the Illinois Freedom of Information Act. 1984. No charge for single copies.

YOUR SCHOOL BOARD AND YOU. Some insights for prospective candidates and other citizens interested in Illinois school boards. Pamphlet updated regularly for public distribution. No charge.

LOBBYING FOR THE PUBLIC SCHOOLS. Explains how school board members and other citizens can work for good school legislation. 60 pages; 1985. Price: $7; IASB Members, $5.

THE SCHOOL OFFICIAL'S GUIDE TO STUDENT DISCIPLINARY HEARINGS, by Gene Cartwright and Allen Schwartz. Describes procedures for suspensions and expulsion hearings and explains different roles of the board and administrators. 52 pages; 1986. Price: $7.50; IASB Members, $5.

EFFECTIVE SCHOOLS THROUGH EFFECTIVE MANAGEMENT, by Allen Klingenberg and Fredric Genck. Reviews problems confronting school management, and offers basic principles and specific suggestions. 198 pages; 1978. Price: $9.50; IASB Members, $6.

FROM THE BOILER ROOM, by Gus. A collection of award-winning *Illinois School Board Journal* essays by Gus, the wise and wry custodian at Eastside Grammar. Gus is the creation of David Carr and Clifford Chaffee, professors at Northern Illinois University who provide insights into daily school life wrapped in Mark Twain humor. 88 pages; 1984. Price: $7, IASB Members, $5.

Address orders and inquiries to: IASB PUBLICATIONS,
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